
ClientTrack™ for Domestic Violence Programs

Indiana Housing &
Community
Development Authority

October 2013

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ClientTrack™ New User Training Manual

ClientTrack™ is an electronic data collection system that stores longitudinal client-level information about persons who access a variety of services for victims of domestic violence and/or sexual assault. ClientTrack™ is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. ClientTrack™ enables information about client needs, goals and service outcomes. To access ClientTrack™ use the link below, this link can also be accessed through the IHCD website.

<https://ihcdaonline.com/IDV/>

Objectives

- Review IHCD Implementation of ClientTrack™ for Domestic Violence Programs and important changes in data collection
- Review ClientTrack™ Security Policies and Procedures
- Learn to log in and complete the following actions:
 - Client Look-up
 - Add New Client
 - Crisis Call Workflow
 - ClientTrack™ Intake Workflow
 - Crimes
 - Protection Orders
 - Client Dashboard
 - Enter Services
 - Referrals
 - Case Notes
 - Complete During Program Enrollment Assessment
 - ClientTrack™ Exit Workflow
 - Submission of Issues to IHCD
 - Sign Out

Violence Against Women Act (VAWA)

VAWA was designed to improve criminal justice responses to domestic violence, sexual assault, and stalking and to increase the availability of services for victims of these crimes. VAWA requires a coordinated community response (CCR) to domestic violence, sexual assault, and stalking, encouraging jurisdictions to bring together players from diverse backgrounds to share information and to use their distinct roles to improve community responses to violence against women. These players include, but are not limited to: victim advocates, police officers, prosecutors, judges, probation and corrections officials, health care professionals, leaders within faith communities, and survivors of violence against women. The federal law takes a comprehensive approach to violence against women by combining tough new penalties to prosecute offenders while implementing programs to aid the victims of such violence. **VAWA has ensured that victims and their**

families have access to the services they need to achieve safety and rebuild their lives (Office on Violence Against Women: Working Together to End the Violence, <http://www.ovw.usdoj.gov/docs/vawa.pdf>).

ClientTrack Staff

Jill Robertson, HMIS Program Manager, jrobertson@ihcda.in.gov, 317-234-7572

Help Desk

ClientTrack™ related issues should be submitted to: DVHelpDesk@ihcdaonline.com

ClientTrack™ Security Policies and Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Participating agencies should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack™ or created for entry into ClientTrack™. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI data including information contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

Privacy and Client Information Restrictions

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full Privacy Policy Notice is available on the IHODA website and should be made available to clients upon request.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in ClientTrack™.

Additional information regarding client consent and restrictions will be covered in more detail during training. ***No person is to be refused services regardless of their participation in ClientTrack™.***

ClientTrack™ Computers

All computers that are used to access ClientTrack™ should be situated in secure locations. ClientTrack™ computers in publicly accessible areas should be staffed at all times and should not be viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your ClientTrack™ password, but rather a password to prevent access to the computer itself.

Passwords

ClientTrack™ usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e. sticky notes on monitors or filed under ClientTrack™ or Password in a Rolodex). ClientTrack™ security policies require the use of strict passwords.

- Must have at least one number
- Must be between 8 and 12 characters
- Must have at least one non-letter, non-numeric character
- Must contain at least one capital letter
- New passwords will be required upon first login
- Accounts are automatically deactivated after 30 days of inactivity

If you need assistance with your username and password contact the Help Desk at DVHelpDesk@ihcdaonline.com and they will assist you.

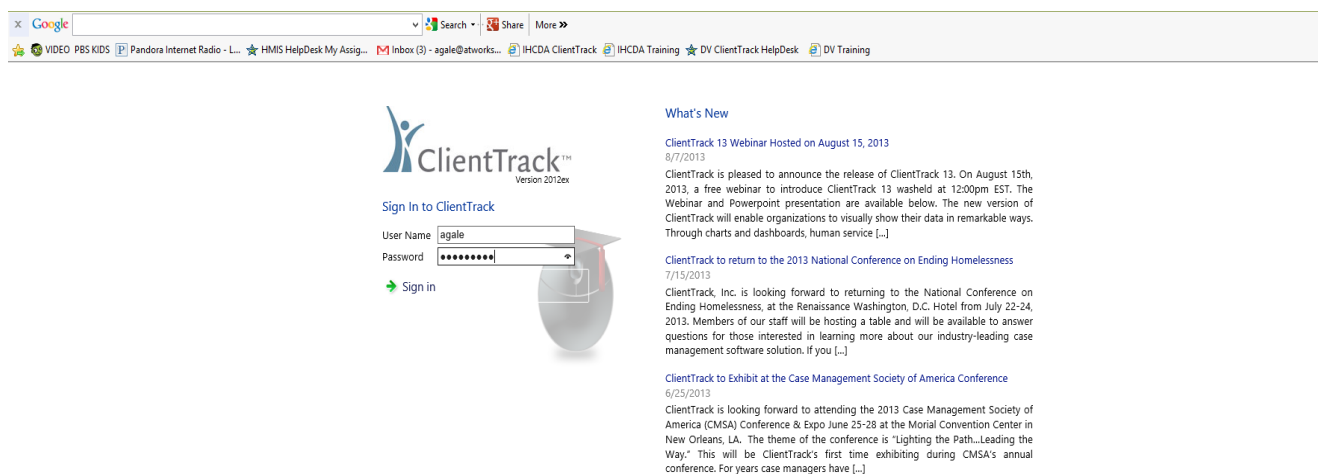
Logging In

ClientTrack™ is a web-based application. In order to log into ClientTrack™ you will need to use an internet browser. ClientTrack™ will work with Microsoft Internet Explorer, Google Chrome, Mobile Safari and Mozilla's Firefox.

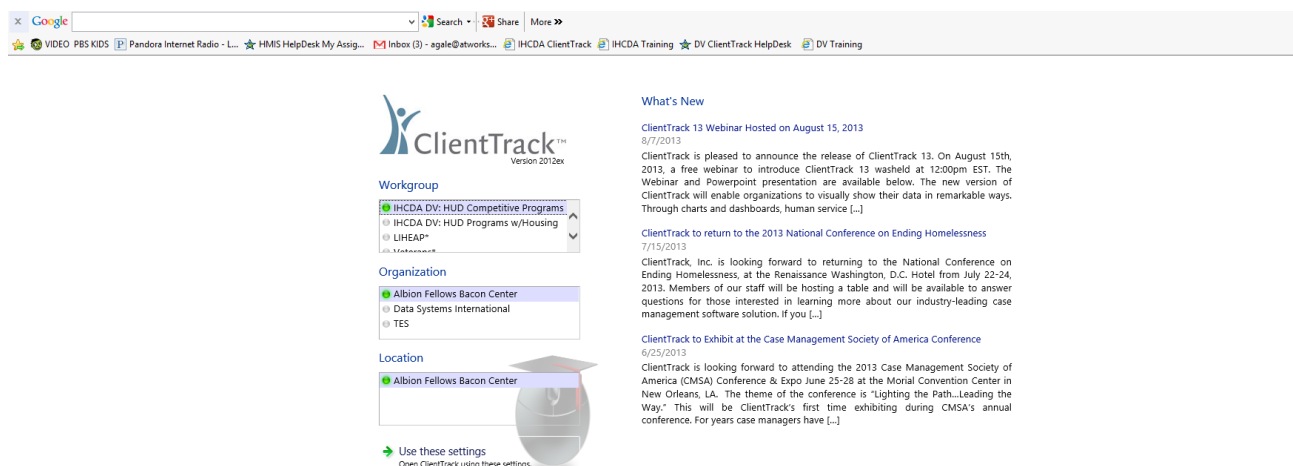
User Login

Open your web browser and go to <https://ihcdaonline.com/idv>. Select the box labeled “ClientTrack.”

Enter your assigned User Name and Password and click “Sign In”. You may be required to reset your password upon your first login. **Remember, sharing your user name and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You should change your settings to allow for pop-ups from this site.**

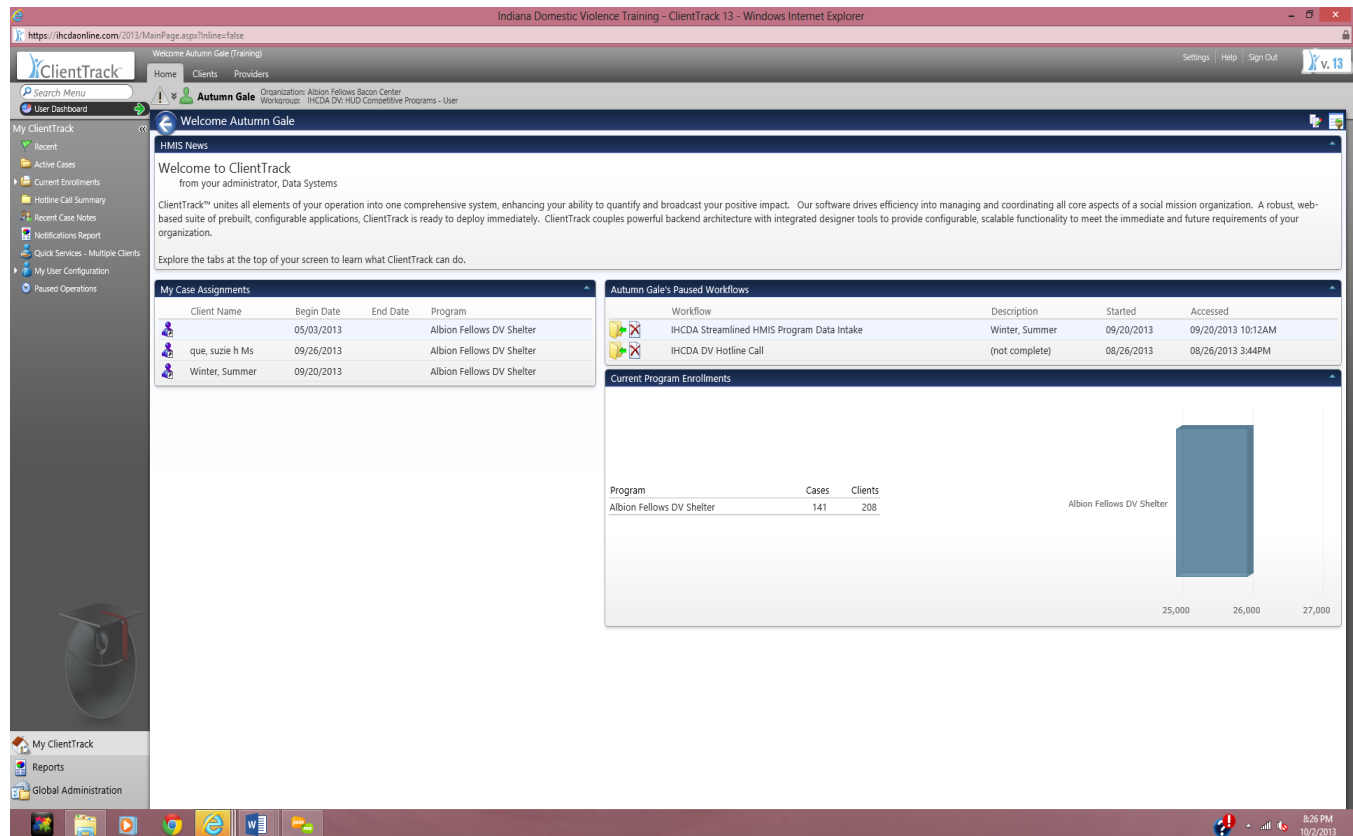


Your organization may participate in other workgroups, so be sure to select the appropriate workgroup. Also, make sure your organization and location is selected appropriately. Click on “Use These Settings” to continue.



“Accept” the Terms of Agreement when you initially log into the system.

You will be directed to your **User Dashboard** and notified of any important “ClientTrack™ News” items IHCDa wants to communicate to you; i.e. upcoming trainings, etc. Other features to become familiar with on this screen include **Tabs** (Home, Clients) and **Menu Items** (along the left side of the screen). Your “Home” screen will also give you a list of your case assignments, upcoming assessments due, paused workflows, and current program enrollments.



Client or Offender Look-Up

Click on the “**Clients**” Tab at the top of screen. Select “**Find Client**” from the menu items along the left of the screen. Enter the name of the client or offender to find a new client, existing client or offender. Be sure to select which “Client Type” you are searching for before conducting the search. The system defaults to “Client” in the “Client Type.” Click “**Search**” in the bottom right-hand corner. Select the client from the list that is displayed if the client is already in the database. If the client is not found in the database, you will add him or her to the database with steps outlined on page 8.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. Even though ClientTrack™ will warn you of potential duplicates, it is important to search for clients and other household members prior to the start of adding a new client.

To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social security number
- Birth date

- Client ID number

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale (Training)

Home Clients Providers

Search Menu

Find Client

Intake Workflow

Crisis Call Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: vin

Last Name: will

Middle Name:

Social Security Number:

Birth Date:

Client ID:

Client Type: Client

Search

0 records found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID	Client Type
No Results Found						

It is important to try different options for your search. **It is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another search hint is to search different spellings and remember to search for nicknames such as “Bet” in addition to “Betty” or “Jen” in addition to “Jennifer.”

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale (Training)

Home Clients Providers

Search Menu

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Hotline Calls

Paused Workflows

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: smith

Last Name: smith

Middle Name:

Social Security Number:

Birth Date:

Client ID:

Client Type: Client

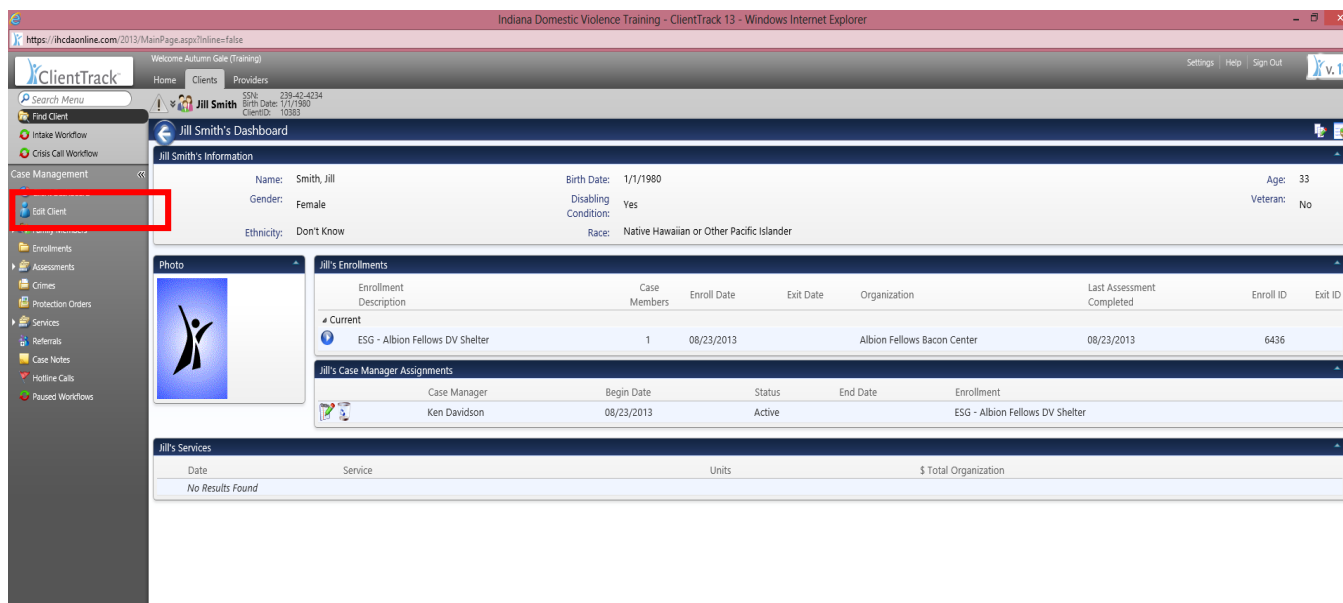
Search

2 records found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID	Client Type
Jill	Smith		XXX-XX-4234	01/01/1980	10383	Client
Jill	Smith			01/01/1980		Client

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select. The selected client’s information will be displayed at the top of the screen. All information entered from this point forward while on the Clients Tab will be associated with the currently selected client.

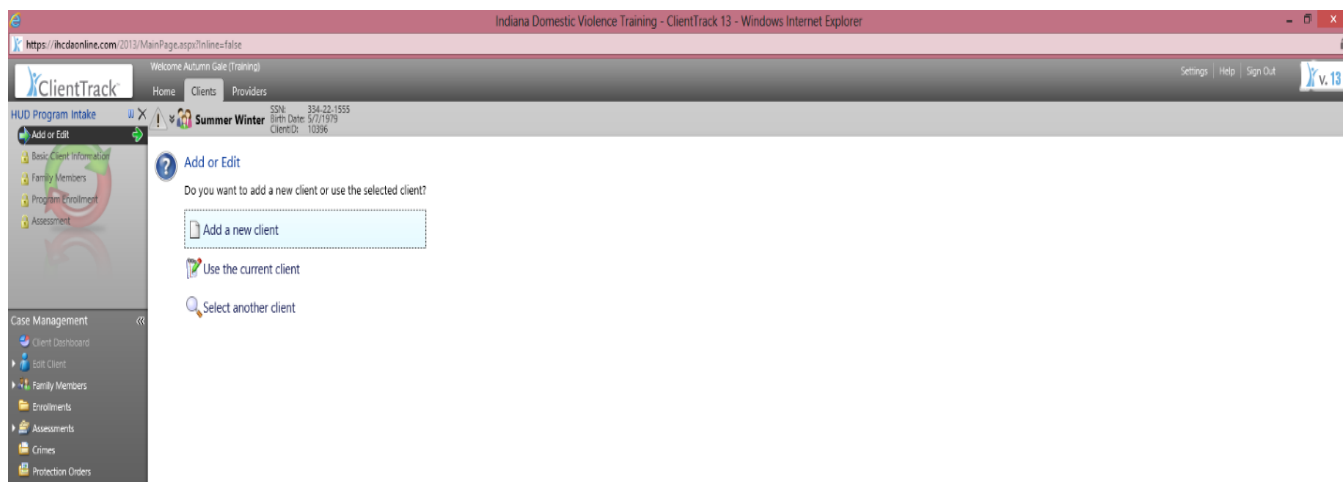
You should click on the **“Edit Client”** menu item found on the left-hand side of the screen seen on page 9 to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). *****Please note that the “Save” button will save the changes you made to the screen and leave you on the same page. The “Save & Close” button will save the changes you have made to the screen and move you to the next one.***



Adding a New Client

ClientTrack™ utilizes a specific workflow to step you through the process of completing all required assessments. The workflow is easy to use and it automatically prompts you for the necessary information.

To add a **NEW** client to the database, select the **"Intake Workflow"** menu item to the left. Choose **"Add a New Client."**



If a duplicate client already exists (and was not identified during the client lookup), a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select. If the client you are entering is in fact a new client, do NOT select a client in the displayed list, click **"Next"** to proceed with the intake process.

****IHCD always works to eliminate duplicate clients in ClientTrack™. Please contact the IHCD DV Help Desk at DVHelpdesk@ihcdaonline.com with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the DV Help Desk please ONLY send Client ID number. Client ID numbers are found to the right of the client name on the client lookup screen or above the client name on the client dashboard. There is a red box around the client ID on page 8 to direct you.**

Crisis Call Workflow

Click **“Crisis Call Workflow”** on the left-hand side of the screen to begin a workflow for a crisis call. The workflow will prompt you through the information you can record while on a crisis call. You can see the workflow process in the upper left-hand corner of the screen. You can pause or cancel a workflow by clicking on the pause button to pause or the black **“X”** to cancel in the upper right-hand corner of the workflow box.

Please note that some of the selections will require more information after you input information. For example, if you select that the **“Caller is the Client,”** you will then be prompted for the caller’s name and a search will be conducted in the database. If the client is in the database already, you can select the client and it will automatically fill that information. If the client is new, click cancel and you will be allowed to enter the first and last name. Click **“Save”** when completed.

The screenshot displays the ClientTrack 13 web application interface. The browser window title is "Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer". The URL is "https://ihcdaonline.com/2013/MainPage.aspx?Online=false". The page header includes "Welcome Autumn Gale (Training)" and navigation links for "Home", "Clients", and "Providers". A sidebar on the left lists "Case Management" options: Client Dashboard, Edit Client, Family Members, Enrollments, Assessments, Crimes, Protection Orders, Services, Referrals, Case Notes, Hotline Calls, and Paused Workflows. The main content area is titled "Hotline Call" and contains a form with the following fields and options:

- Date and Time: 10/05/2013 09:24 AM
- Contact Type: ☒ Hotline Call, ☐ Walk-in, ☐ TTY
- Call Type: ☒ Crime/Victimization, ☐ Information, ☐ Other, ☐ Hangup/Prank
- 911 Needed: Yes
- 911 Contacted By: Autumn Gale
- Caller Type: ☒ Identified Caller, ☐ Anonymous Caller
- Caller Last Name: Winter
- Caller First Name: Summer
- Client Type: ☒ Caller is the Client, ☐ New or Existing Client, ☐ Option not in list
- Are you safe?: Yes
- Are you injured?: Yes
- Is Abuser Present?: No
- Victimization Type: Domestic Violence
- Shelter Needed: Yes
- #Adults: 1
- #Children: 1

A "Save" button is located at the bottom right of the form. The Windows taskbar at the bottom shows the time as 9:25 AM on 10/5/2013.

The next screen is the client’s information. If you selected a client who is already in the database, the information will populate and you can confirm or make changes as necessary. If the client is new, you will complete the information and please note that all red * fields are required to continue in the workflow.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?Online=false

Welcome Autumn Gale (Training)

Home Clients Providers

SSN: 334-22-1555
Birth Date: 05/07/1979
ClientID: 10396

ClientTrack

Client Information

Basic Client Information

Complete the client's identifying information.

First Name: Summer
Last Name: Winter
Middle Name:
Suffix:
Social Security Number: 334-22-1555

Basic Client Demographics

Birth Date: 05/07/1979
Client Age: 34
Date of Birth Quality: ☒ Full DOB Reported
☐ Approximate or Partial DOB Reported
☐ Don't Know
☐ Refused
Ethnicity: Non-Hispanic/Latino
Race: American Indian or Alaska Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
☒ White
Don't Know
Gender: Female
Marital Status: Living Together
Citizenship: - SELECT -
Primary Language: - SELECT -

Family Information

Family: Winter, Summer - 1979
Relationship to Head of Household: Self

Contact Information

Case Management

Client Dashboard
Edit Client
Family Members
Enrollments
Assessments
Crimes
Protection Orders
Services
Referrals
Case Notes
Hotline Calls
Paused Workflows

Finish No Changes

9:26 AM
10/5/2013

Click “Finish” or “No Changes” when completed.

Quick Referrals will allow you to document any referrals made on the crisis call. You can add as many referrals as you need by clicking on “Add Lines.” Providers can be added in the database so they are easily input in this section of the workflow. See the “Referrals and Providers Quick Reference Guide” for instructions on adding referrals and providers. Click “Save & Close” or “Skip” when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?Online=false

Welcome Autumn Gale (Training)

Home Clients Providers

SSN: 334-22-1555
Birth Date: 05/07/1979
ClientID: 10396

ClientTrack

Client Information

Quick Referrals

Use this form to identify multiple referrals for a client, quickly. Change the Referral Screen to filter pre-defined referrals available. To add additional referrals that are not listed, add new rows to the bottom of the form. Choose a service that the client needs and the list of providers will show all providers that provide that service.

Referral Date: 10/05/2013
Referring Provider Name: Albion Fellows Bacon Co.
Referring Location: Albion Fellows Bacon Center
Referring User: Autumn Gale

0 records found.

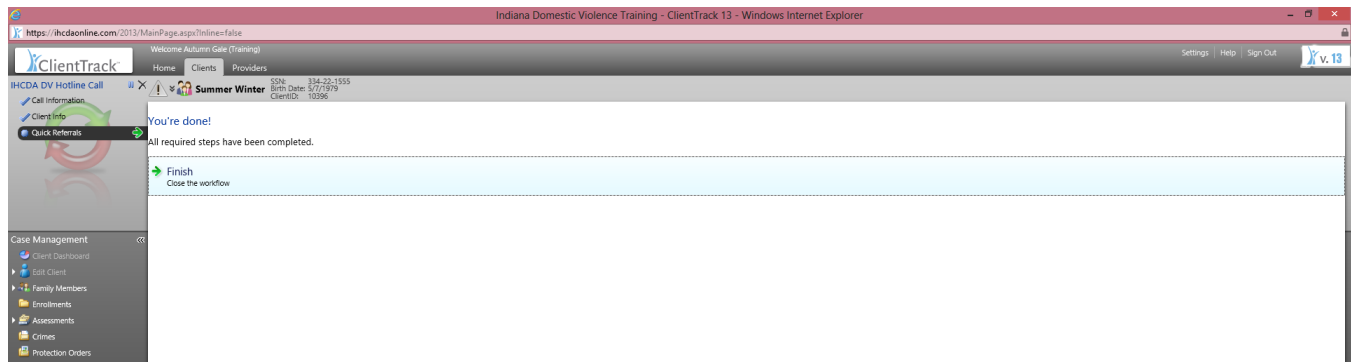
Referral Status	Service	Provider Name	Telephone	Street	City	State	Zip Code
<input checked="" type="checkbox"/> Referral Made	Rental Assistance						
<input type="checkbox"/> - SELECT -	- SELECT -						

Add Lines 1

Case Management

Client Dashboard
Edit Client
Family Members
Enrollments
Assessments
Crimes
Protection Orders
Services
Referrals
Case Notes
Hotline Calls
Paused Workflows

When you complete the last step in the workflow, it will let you know you are finished.



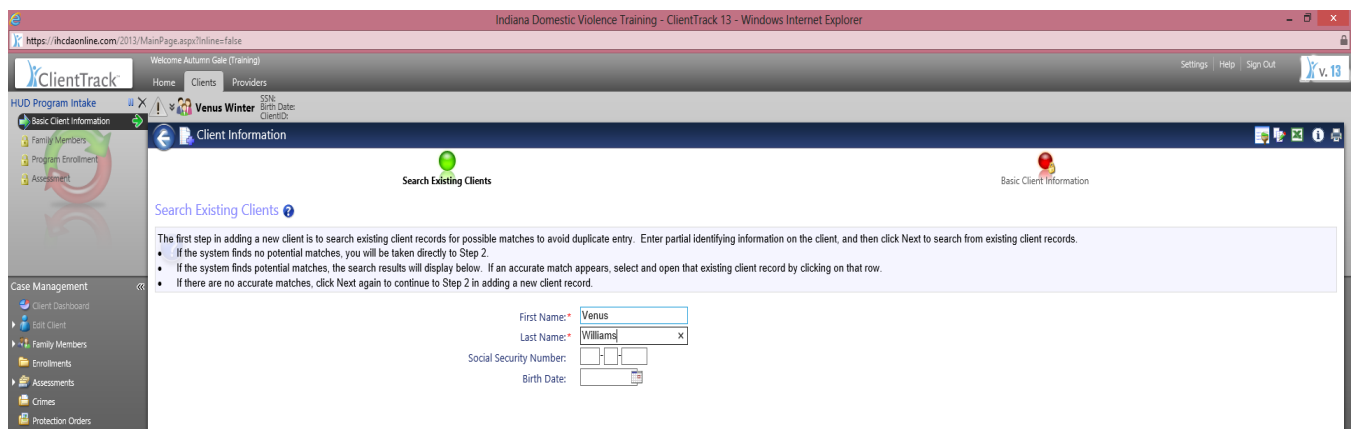
To view crisis calls for selected client, you can click on **“Crisis Calls”** with a little red flag on the left-hand side of the client dashboard. This will allow you to review previous calls or make any necessary edits.

Intake Workflow

Click **“Intake Workflow”** on the left-hand side of the screen. **Be sure you begin the workflow while on the client record for the Head of Household.** You will be asked to verify the intake information for the client. Make any changes if necessary and click **“Save.”** If there are no changes, click **“No Changes.”**

The steps for the workflow will be displayed in the upper left-hand corner of the screen. The first step is the completion of the Master Assessment. On the Master Assessment screen, be sure to change the Assessment Date if different from today’s date.

To search for a client in the system, type the first few letters of the first name and last name, and then click on the **“Next”** button on the bottom of the screen (this will automatically search for client a second time).



Once you have searched for the client and click **“Next,”** you will be prompted to enter demographic information for the client. Items with a red * are required fields and records cannot be saved without entering this data. Birthdate and Phone Number fields are auto-formatted so that dashes are not required when entering information in these fields. Birthdates can be entered in mmddyyyy format. Once entered, they will be automatically formatted to the appropriate display. Click on the **“Next”** button when finished.

All the following information is self-declared. Please do not make up information or answer for the client.

First Name – Legal first name (do not add nicknames in “quotes” – those are not searchable elements, add this information to the alias field)

Last Name – Legal Last Name

Social Security Number – If the client does not know or refuses to provide their SSN, **DO NOT** under any circumstance, enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best fits the situation.

Birth Date – Month, day and year the client was born. Again, do not use a fake number. Choose the appropriate data quality option that best fits the situation.

Ethnicity – Determines if a client is of Hispanic/Latino origin and includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.

Race – This is a self-identified data element and a person can identify with multiple races. This is a multi-select box that allows for multiple races to be checked.

Gender – Select gender with which client identifies.

Household – Do NOT enter anything in the Household field. ClientTrack™ will create a household/household account.

Relationship to Head of Household – When entering the first client in the household, the system will default to “Self.” It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.

Address – Add the address where client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

The screenshot displays the ClientTrack 13 web application interface. The main form is titled "Basic Client Information" and contains the following fields and options:

- First Name:** Venus
- Last Name:** Williams
- Middle Name:** (empty)
- Suffix:** (empty)
- Social Security Number:** 448-55-9601
- Birth Date:** 02/22/1983
- Client Age:** 30
- Date of Birth Quality:** ☒ Full DOB Reported, ☐ Approximate or Partial DOB Reported, ☐ Don't Know, ☐ Refused
- Ethnicity:** Non-Hispanic/Latino
- Race:** ☒ Black or African American, ☐ American Indian or Alaska Native, ☐ Asian, ☐ Native Hawaiian or Other Pacific Islander, ☐ White, ☐ Don't Know
- Gender:** Female
- Marital Status:** Living Together
- Citizenship:** U.S. Citizen
- Primary Language:** English
- Family:** (empty)
- Relationship to Head of Household:** Self

At the bottom right of the form, there are "Previous" and "Finish" buttons. The "Finish" button is highlighted in blue.

Click on the “Finish” button when completed.

Adding Household Members

Next, you will be prompted to add any additional household members. Select the **“Household Type.”** Click on the **“Empty Box”** and a check mark will appear. Enter the name of the next household member; the system will complete a search for that client name.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?Inline=false

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

SSN: 448-55-9601
Birth Date: 02/22/1983
ClientID: 10923

Venus Williams

Household and Household Members

The selected client's household and household members are listed below. You can associate other clients with this household by searching for the client(s), or you can add new clients to the database by entering their information below.

Household Name: Williams, Venus - 1983
Household Type: Single Parent / Female

1 record found.

	First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Relationship to Head of Household	Race	Ethnicity
<input checked="" type="checkbox"/>	Venus		Williams	Female	02/22/1983	30	Full DOB	448-55-9601		Self	Black or African Ame.	Non-Hisp
<input checked="" type="checkbox"/>	Satum		Williams	Female	04/08/2003	10	Full DOB	365-22-4444		Daughte	Black or African Ame.	Non-Hisp
				--SELECT--		N/A	--SELEC--		--SELEC--	--SELE--		--SELEC--

1

If the client is found, select the client from the list and edit as necessary. Select **“Cancel”** if the client is not found in the system.

Household and Household Members

The selected client's household and household members are listed below. You can associate other clients with this household by searching for the client(s), or you can add new clients to the database by entering their information below.

1 record found.

	First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Relationship to Head of Household	Race	Ethnicity
<input checked="" type="checkbox"/>	Venus		Williams	Female	02/22/1983	30	Full DOB	448-55-9601		Self	Black or African Ame.	Non-Hisp
<input checked="" type="checkbox"/>	Satum		Williams	Female	04/08/2003	10	Full DOB	365-22-4444		Daughte	Black or African Ame.	Non-Hisp
				--SELECT--		N/A	--SELEC--		--SELEC--	--SELE--		--SELEC--

1

Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name: Satum
Last Name: Williams
Middle Name:
Social Security Number:
Birth Date:
Client ID:
Client Type: Client

Search

0 records found.

	Last Name	Middle Name	SSN	Birth Date	Client ID	Client Type
No Results Found						

Please be sure to complete all information requested. For the race category, you must click on the blue line with the three blue dots to access the race categories. Be sure to select a race and then click on the **“Green Circle”** with the check mark. Be careful not to use the select all icon. Add lines for additional household members as necessary by clicking on the **“Add Lines”** box.

Household Name:

Household Type:

2 records found.

First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Relationship to Head of Household	Race	Ethnicity
Venus		Williams	Female	02/22/1983	30	Full DOB	448-55-9601		Self		
Saturn		Williams	Female	04/08/2003	10	Full DOB	365-22-4444		Daughters	Black or African Ame...	Non-Hisp

Add Lines

Click the “**Save**” button when all household members have been added. You will receive an error message if you are missing any required data fields. If you receive this error message, review the information and input any missing data.

You will then be prompted to create the enrollment. ****Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.**

Name: Williams, Venus

Enrollment Date:

HUD Grant:

Program:

Family:

Relationship to Head of Household:

Case Manager:

You will be required to choose the HUD Grant and Program and click “**Next.**” *If you do not find your specific grant and/or program, cancel the workflow by click the black “X” in the workflow screen found in the upper left-hand corner and please notify IHCDa immediately at DVHelpDesk@ihcdaonline.com. Please include the name of your grant and program along with specific contact information so that the issue can be resolved as soon as possible. Grant and program information must be set up in the system before you can begin to enroll clients.*

Click the “**Save**” button when completed.

You will now begin a series of required assessments that will finalize the household enrollment. Make sure to properly check “**Yes**” or “**No**” for the Veteran Status and Disabling Condition. Certain logic is built into the system that will provide for additional drop down menu options based on the way certain client data is entered. Because this client is a veteran, additional questions are required to be answered.

The screenshot shows the 'Universal Data Assessment' form in the ClientTrack 13 application. The form is for client Venus Williams (SSN: 448-55-9621, Birth Date: 2/22/1983, ClientID: 10623). The form includes the following sections and fields:

- Assessment Information:**
 - Assessment Date: 10/02/2013
 - Age at Assessment: 30
 - Assessment Type: Entry
 - Program: Albion Fellows DV Shelter
 - Assessor: Autumn Gale
- Veteran Information:**
 - Veteran Status: Yes
 - Disabling Condition: No
 - Military Branch: Army
 - Service Era: Post September 11, 2001 (September 11, 2001 - Present)
 - Duration of Active Duty (Months): 48
 - Discharge Status: General
 - Served War Zone: Yes (selected), No, Don't Know, Refused
- Prior Residence:**
 - Residence Prior to Program Entry: Rental by client, no ongoing housing subsidy
 - Length Of Stay: More than three months, but less than one year
- Prior Zip Code:**
 - Prior Zip Code: 46205
 - City: Indianapolis
 - State: IN
- Housing Status:**
 - Housing Status: Literally Homeless
 - Continuously Homeless for a Year or More: []
 - 4 Episodes of Homelessness in the Past 3 Years: []
- Chronically Homeless Determination:**
 - Chronically Homeless: No

A red box in the top right corner highlights the printer, help, and information icons.

Here is an example of the optional Veteran Information:

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today’s date).

Residence Prior to Program Entry – Identify where the client was staying on the night before the client is enrolled in your program.

Length of Stay – Identify the length of stay for the residence prior to program entry.

Prior Zip Code – Remember this is the zip code of the client’s last permanent residence of 90 days or more. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon. There is a red box indicating where it is located on page 15 to assist you in finding it.

Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or experience 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness,

developmental disability or a chronic physical illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client's status of chronically homeless.

Barriers Assessment

The built in logic may create additional fields that are required. All fields with a red * are required. Only select a barrier by clicking on the box beside it if a barrier is present. If the client has no barriers, click on the **"No Barriers"** button in the lower right-hand corner. It is important to keep in mind clients must have at least one barrier to be eligible for some programs (such as Shelter+Care). Click **"Save & Close"** when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://hcdsonline.com/2013/MainPage.aspx?inline=false&InitialPage=28&InitialContent=https://hcdsonline.com/2013/viewform.aspx?formID=3098%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOCSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gate (Training)

Home Clients Providers

ClientTrack

Basic Client Information

Family Members

Program Enrollment

Assessment

Barriers / Special Needs

Domestic Violence

Income

Non-Cash Benefits

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Barriers

Please address the following:

There is 1 row in the result set that requires attention.

The selected clients barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Barrier	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	Yes	10/02/2013	No	Yes	
Chronic Health Condition	Yes	10/02/2013	No		Diabetes Type II
Developmental Disability	Yes	10/02/2013	No		
Drug Abuse	-- SELECT --				
HIV/AIDS	-- SELECT --				
Mental Health	-- SELECT --				
Physical Disability	-- SELECT --				

3

Condition is Indefinite is a required field.

Save Save & Close No Barriers

8:53 PM 10/2/2013

Domestic Violence Assessment

There are three sections in the Domestic Violence assessment. All fields with a red * are required. Then click **“Next”** when ready to move on to the next section.

The screenshot shows the 'Domestic Violence Assessment of Victim' screen in the ClientTrack 13 application. The interface includes a sidebar with navigation options like 'HUD Program Intake', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Assessment', 'Barriers / Special Needs', 'Domestic Violence', 'Income', 'Non-Cash Benefits', 'Employment', 'Case Management', 'Client Dashboard', 'Edit Client', 'Family Members', 'Enrollments', 'Assessments', 'Crimes', 'Protection Orders', 'Services', 'Referrals', 'Case Notes', 'Hotline Calls', and 'Paused Workflows'. The main content area is titled 'Domestic Violence Assessment of Victim' and contains several sections: 'Assessment Active', 'Victim Information', 'Domestic Violence', 'Sexual Assault', and 'Survivor History'. The 'Victim Information' section includes fields for 'Is client a victim of domestic violence?' (Yes), 'When Exp Occurred:' (Within the past three months), 'Assessment Date:' (10/02/2013), 'Victimization Date:' (09/30/2013), 'Age at Time of Incident:' (30), 'Interviewer:' (Autumn Gale), and 'Assessment Description:' (Initial Intake). The 'Domestic Violence' section includes 'Interview Type:' (In-Person), 'Physical:' (checked), 'Sexual:' (checked), 'Psychological:' (unchecked), 'Weapon Used:' (Other), 'Associated with DV - Alcohol:' (Yes, By Abuser), 'Associated with DV - Drugs:' (Yes, By Victim), and 'Length of Violent Relationship:' (Under 1 Year). The 'Sexual Assault' section includes 'Sexual Assault Type:' (Adult Sexual Assault), 'Sexual Assault Type:' (Adult Molested as Child), 'Sexual Assault Type:' (Child Sexual Abuse), 'Sexual Assault Type:' (Rape), 'Sexual Assault Type:' (Attempted Rape), 'Sexual Assault Type:' (Other Sexual Contact), 'Sexual Assault Location:' (Victim's Home), and 'Length Before Contact:' (2 - 6 Months). The 'Survivor History' section includes 'Survivor of Incest:' (unchecked) and 'Other Child Sexual Abuse:' (unchecked). The bottom right corner of the screen has 'Next' and 'Skip' buttons.

You can go back to the previous screen by clicking on **“Previous”** in the lower right-hand corner of the screen. Please note that the information you entered on the current screen will be lost if going back to the previous screen.

The screenshot shows the 'Other Information and Offender's Relationship to Victim' screen in the ClientTrack 13 application. The interface includes a sidebar with navigation options like 'HUD Program Intake', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Assessment', 'Barriers / Special Needs', 'Domestic Violence', 'Income', 'Non-Cash Benefits', 'Employment', 'Case Management', 'Client Dashboard', 'Edit Client', 'Family Members', 'Enrollments', 'Assessments', 'Crimes', 'Protection Orders', 'Services', 'Referrals', 'Case Notes', 'Hotline Calls', and 'Paused Workflows'. The main content area is titled 'Other Information and Offender's Relationship to Victim' and contains several sections: 'Other Information' and 'Offender's Relationship to Victim'. The 'Other Information' section includes 'Child Abuse (960):' (unchecked), 'Physical Abuse:' (unchecked), 'Psychological Abuse:' (unchecked), 'Child Witnessed Abuse:' (unchecked), 'Abuse through Neglect:' (unchecked), and 'Other Type of Abuse:' (SELECT). The 'Offender's Relationship to Victim' section includes 'Relationship to Victim:' (Intimate Partner).

Click **“Finish”** when completed.

Financial Assessment: Cash Benefits

An Income Assessment will be completed for EACH household member. You must answer the question of income and non-cash benefits received. You must select “Yes” or “No” for “Income Received” and “Non-cash Benefits” as outlined with the red boxes on page 20 – these are required fields and indicated by a red *. **Note:** *Income received by a household member such as child support, TANF, WIC and food stamps should be designated on the assessment of the household member who directly receives payment. If an adult receives a SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child.* It is very important that income (cash or non-cash) is properly designated on the proper client assessment and that amounts are reported as **monthly amounts**.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker’s Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran’s Disability Payment – Disability payment provided by the Department of Veteran’s Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran’s Pension – Cash payment made by the Department of Veteran’s Affairs

Veteran’s Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https%3A%2F%2Fihcdaonline.com%2F2013%2Fviewform.aspx%3FformID%3D3098%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOSSELECT%3DTrue%26PageID%3D302%26MenuID%3D30380

Welcome Autumn Gade (Training)

Home Clients Providers

Venus Williams SSN: 448-55-9821 Birth Date: 2/22/1983 ClientID: 10623

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Assessment Active

Assessment Date: 10/02/2013 [dd/mm/yyyy]

Income Received: Yes

Non-cash Benefits: Yes

Income Group: Cash Income

15 records found.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Earned Income (i.e., employment income)	
	Unemployment Insurance	
	Supplemental Security Income (SSI)	
	Social Security Disability Income (SSDI)	
	Veteran's Disability Payment	
	Private Disability Insurance	
	Worker's Compensation	
	Temporary Assistance for Needy Families (TANF)	
	General Assistance	
	Retirement income from Social Security	
	Veteran's Pension	
	Other Pension	
	Child Support	
	Alimony or other spousal support	
	Other Income	
	Employment at Wal-Mart	\$1,200.00

Count/Total Monthly Income: 1 \$1,200.00

Save Save and Close

9:10 PM 10/2/2013

Click “Save and Close” when completed.

Financial Assessment: Non-Cash Benefits

This assessment is specific to individual – not the household in general. An assessment for non-cash benefits will be completed for each household member. You must select “Yes” or “No” for “Income Received” and “Non-cash Benefits” – these are required fields and indicated by a red *. All amounts reported are **monthly amounts**.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps).

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary.

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older.

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran’s Administration Medical Services - Health care benefits and services provided for Veterans.

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.

Other Source – Any source not previously listed above.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?FormID%3D98%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

Home Clients Providers

ClientTrack

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Assessment
- Barriers / Special Needs
- Domestic Violence
- Income
- Non-Cash Benefits

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Enrollments
- Assessments
- Crimes
- Protection Orders
- Services
- Referrals
- Case Notes
- Hotline Calls
- Paused Workflows

Venus Williams

SSN: 448-55-9621
Birth Date: 2/22/1983
ClientID: 10823

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Enter Expenses

Assessment Active

Assessment Date: 10/02/2013
Income Received: Yes
Non-cash Benefits: Yes

Income Group: Non-cash Benefit

12 records found.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)	SNAP Food Stamps	\$200.00
<input type="checkbox"/> MEDICAID		
<input type="checkbox"/> MEDICARE		
<input type="checkbox"/> State Children's Health Insurance Program		
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)		
<input type="checkbox"/> Veteran's Administration Medical Services		
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> TANF Transportation Services		
<input type="checkbox"/> Other TANF-funded Services		
<input type="checkbox"/> Section 8, Public Housing, or Other Ongoing Rental Assistance		
<input type="checkbox"/> Other Source		
<input type="checkbox"/> Temporary rental assistance		

Count/Total Monthly Income: 1 \$200.00

Save Save and Close

Click **"Save and Close"** when completed.

Employment Assessment

When filling out the Employment Assessment keep in mind the built in logic may require you to fill out additional information. Click **"Save"** when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?FormID%3D98%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

Home Clients Providers

ClientTrack

HUD Program Intake

- Barriers / Special Needs
- Domestic Violence
- Income
- Non-Cash Benefits
- Employment
- Education
- Health
- Legal
- Transportation

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Enrollments
- Assessments
- Crimes
- Protection Orders

Venus Williams

SSN: 448-55-9621
Birth Date: 2/22/1983
ClientID: 10823

Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.

Default Last Assessment

Assessment Active

Assessment Date: 10/02/2013
Employed: Yes
Hours Worked in Last Week: 32.00
Employment Tenure: Temporary
Looking for additional employment / increased hours: Yes

Adult Education Assessment

When filling out the Adult Education Assessment, remember certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, but has not received a degree you should select **“Post-Secondary School”** and the select **“None”** in the Secondary Education box. You can also select multiple degrees if applicable. Click **“Save”** to continue.

The screenshot shows the 'Adult Education Assessment' form in the ClientTrack 13 application. The form is titled 'Adult Education Assessment' and includes instructions: 'Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select the secondary education degree(s) the client has earned.' The form fields are: 'Assessment Date' (10/02/2013), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (High school diploma), and 'Secondary Education' (Associates Degree, Bachelors, Masters, Doctorate, Other academic/professional degree). The 'Secondary Education' dropdown is open, showing the selected option 'Associates Degree'.

Health Assessment

Note: (Female Only) If you say “Yes” to the Pregnancy Status, it will ask you for the Due Date of the unborn child. Click **“Save”** when completed.

The screenshot shows the 'Health Assessment' form in the ClientTrack 13 application. The form is titled 'Health Assessment' and includes instructions: 'Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.' The form fields are: 'Assessment Date' (10/02/2013), 'General Health Status' (Good), 'Pregnancy Status' (Yes, No, Don't Know, Refused), and 'Pregnancy Due Date' (06/02/2014). The 'Pregnancy Status' dropdown is open, showing the selected option 'Yes'.

Legal Assessment

The Legal Assessment allows you to record important legal information pertaining to your client. Click **“Save”** when completed.

The screenshot shows the 'Legal Assessment' form in the ClientTrack 13 application. The form is titled 'Legal Assessment - Describe the Client's current legal situation.' and includes a 'Default Last Assessment' button. The 'Assessment Active' section shows the 'Date of Assessment' as 10/02/2013 and the 'Assessment Description' as 'Legal Situations - Are you currently involved in any of the following legal situations?'. The 'Legal Situations' section contains a list of legal issues with checkboxes: Divorce, Eviction, Bill Collector, Pending Criminal Charges, Order of Protection, Probation / Parole, Custody Issues, Child or Spousal Support, Warrant for Arrest, CPS Involvement, and Other. The 'Other Legal Questions' section includes 'Do You Currently Have Legal Representation?' (checked) and 'How Many Days, Past 30 Days, experiencing Legal Pr:' (45). The 'Legal Notes' section includes a 'Legal Description Notes' field with the text 'Client is in the process of filing bankruptcy and custody issues.'.

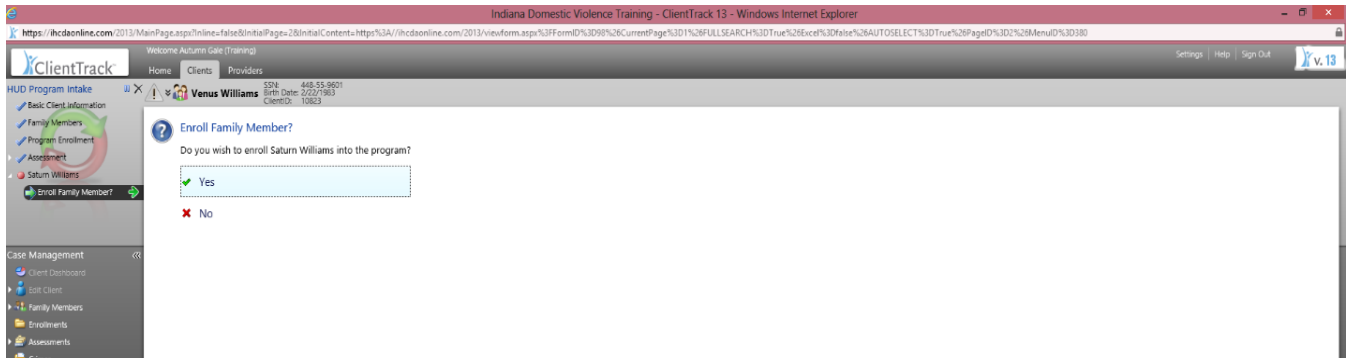
Transportation Assessment

The Transportation Assessment allows you to record important information about your client's transportation, vehicle specifics, license plate number, etc. This may be helpful information for your organization to collect for your records. Click **“Save”** when completed.

The screenshot shows the 'Transportation Assessment' form in the ClientTrack 13 application. The form is titled 'Transportation Assessment' and includes a 'Default Client's Last Assessment' button. The 'Assessment Active' section shows the 'Assessment Date' as 10/02/2013 and the 'Primary Transit Means' as 'Own Vehicle'. The 'Vehicle' section includes fields for 'Vehicle Ownership' (Own), 'Vehicle Make' (Honda), 'Vehicle Model' (Civic), 'Vehicle Year' (2000), 'Vehicle Description' (White, four door sedan), 'Vehicle Condition' (In need of repair), and 'Vehicle Condition Description' (Broken headlight). The 'Registered State' is CT, 'License Plate Number' is 310 BYG, 'Insurance Company' is None, and 'Insurance Renewal Date' is 09/01/2013. The 'Drivers License' section includes fields for 'License Number' (1111-11-1111), 'License State' (CT), and 'License Expiration Date' (06/01/2013).

Enrollment process for Child and/or other Household Member

Click the “**Yes**” button if enrolling children or other household members, and you will be prompted through the entry assessments for the children or household members. If enrolling a single client, you would select “**No**” and complete the enrollment process.



Universal Data Assessment

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today's date).

Residence Prior to Program Entry – Identify where the client was staying on **the night before** the client is enrolled in your program.

Length of Stay – Identify the length of stay for the residence prior to program entry.

Prior Zip Code – Remember this is the **zip code of the client's last permanent residence of 90 days or more**. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon. There is a red box indicating where it is located on page 15 to assist you in finding it.

Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or experience 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness, developmental disability or a chronic physical illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client's status of chronically homeless.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?FormID%3D3098%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

SSN: 365-22-4444
Birth Date: 4/6/2003
ClientID: 13024

Saturn Williams

Enroll Family Member?

Assessment

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Default Information From Head of Household

Assessment Date: 10/02/2013

Age at Assessment: 10

Assessment Type: Entry

Program: Albion Fellows DV Shelter

Assessor: Autumn Gale

Veteran Status: No

Disabling Condition: No

Prior Residence - Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Residence Prior to Program Entry: Rental by client, no ongoing housing subsidy

Length Of Stay: One to three months

Prior Zip Code - Enter the prior zip code of the apartment, room, or house where the client last lived for 90 days or more.

Prior Zip Code: 46205

City: Indianapolis

State: IN

Housing Status - For each client, determine whether the client is: literally homeless; imminently losing their housing; unstably housed and at-risk of losing their housing; or in a stable housing situation.

Housing Status: Literally Homeless

Continuously Homeless for a Year or More: ☐

4 Episodes of Homelessness in the Past 3 Years: ☐

Chronically Homeless Determination - Based upon the assessment completed, the following determination has been made.

Chronically Homeless: No

Once the Universal Data Assessment is completed, click **“Save.”**

Barriers Assessment

The built in logic may create additional fields that are required. All fields with a red * are required. Only select a barrier by clicking on the box beside it if a barrier is present. If the client has no barriers, click on the **“No Barriers”** button in the lower right-hand corner. It is important to keep in mind clients must have at least one barrier to be eligible for some programs (such as Shelter+Care). Click **“Save & Close”** when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?FormID%3D3098%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

SSN: 365-22-4444
Birth Date: 4/6/2003
ClientID: 13024

Saturn Williams

Enroll Family Member?

Assessment

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Barriers

The selected clients barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Assessment Active

<input type="checkbox"/>	Barrier	Help	Barrier Present*	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
<input type="checkbox"/>	Alcohol Abuse	?	-- SELECT --				
<input type="checkbox"/>	Chronic Health Condition	?	-- SELECT --				
<input checked="" type="checkbox"/>	Developmental Disability	?	Yes	10/02/2013	Yes		Dyslexia
<input type="checkbox"/>	Drug Abuse	?	-- SELECT --				
<input type="checkbox"/>	HIV/AIDS	?	-- SELECT --				
<input type="checkbox"/>	Mental Health	?	-- SELECT --				
<input type="checkbox"/>	Physical Disability	?	-- SELECT --				

1

Domestic Violence Assessment

In order to bypass a DV Assessment for children, click on the “Skip” button in the bottom right-hand corner. There are three sections in the Domestic Violence assessment. All fields with a red * are required. Then click “Next” when ready to move on to the next section.

The screenshot shows the ClientTrack 13 web application interface. The left sidebar contains navigation links for HUD Program Intake, Basic Client Information, Family Members, Program Enrollment, Assessment, Barriers/Special Needs, Domestic Violence, Income, Non-Cash Benefits, Case Management, Client Dashboard, Edit Client, Family Members, Enrollments, Assessments, Crimes, Protection Orders, Services, Referrals, Case Notes, Hotline Calls, and Paused Workflows. The main content area is titled "Domestic Violence Assessment of Victim" and includes a "Default Client's Last Assessment" button. The form contains the following sections:

- Victim Information:** Includes fields for "Is client a victim of domestic violence:" (Yes), "When Exp Occurred:" (Within the past three months), "Assessment:" (10/02/2013), "Victimization Date:" (09/30/2013), "Age at Time of Incident:" (30), "Interviewer:" (Autumn Gale), and "Assessment Description:" (Initial Intake).
- Domestic Violence:** Includes a section for "Interview Type:" with radio buttons for "In-Person" and "Phone Call Only". It also includes checkboxes for "Physical:", "Sexual:", and "Psychological:". Below this, there are radio buttons for "Sexual Assault Type:" (Adult Sexual Assault, Adult Molested as Child, Child Sexual Abuse) and "Sexual Assault Type:" (Rape, Attempted Rape, Other Sexual Contact). It also includes a dropdown for "Sexual Assault Location:" (Victim's Home) and a dropdown for "Length Before Contact:" (2 - 6 Months).
- Survivor History:** Includes checkboxes for "Survivor of Incest:" and "Other Child Sexual Abuse:".

The bottom right corner of the form has "Next" and "Skip" buttons.

You can go back to the previous screen by clicking on “Previous” in the lower right-hand corner of the screen. Please note that the information you entered on the current screen will be lost if going back to the previous screen.

The screenshot shows the ClientTrack 13 web application interface, specifically the "Other Information and Offender's Relationship to Victim" section. The left sidebar is the same as in the previous screenshot. The main content area is titled "Other Information and Offender's Relationship to Victim" and includes a "Previous" button in the lower right-hand corner. The form contains the following sections:

- Other Information:** Includes checkboxes for "Child Abuse (960's)", "Physical Abuse:", "Psychological Abuse:", "Child Witnessed Abuse:", "Abuse through Neglect:", and "Other Type of Abuse:" (with a dropdown menu).
- Offender's Relationship to Victim:** Includes a dropdown for "Relationship to Victim:" (Intimate Partner).

ClientTrack

Home Clients Providers

Autumn Winter SD# 222-86-4444 Birth Date: 2/14/1998 ClientID: 10389

Domestic Violence Assessment of Victim

Legal / Crime Information

Legal Information - Enter the legal information relative to the specific victim situation below.

Law Enforcement Called: Yes

Abuser Arrested: Yes

Incident Report Filed: Yes

Signer of Report: Victim

Legal / Resolution - Please check all that apply.

Criminal Complaint Filed: ☐

Went to Court: ☐

Convicted: ☐

Civil Resolution: ☐

No Legal Resolution: ☒

Restriction: ☒ Restrict to Organization ☐ Restrict to User ☐ Unrestricted

Click **"Finish"** when completed.

Financial Assessment: Cash Benefits

Remember this is the financial assessment for the second household member (and in this case a child). Children are typically only going to have minimal options on this list such as SSI (death benefits). TANF, Food Stamps and Child Support remain as income for the parent/guardian – not the child. When recording an amount be sure to record the **monthly amount**.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false&InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?3FormID%3D098%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%3Dfalse%3Dtrue%26AUTOSLECT%3DTrue%26PageID%3D2%26MenuID%3D30380

Welcome Autumn Gale (Training)

Home Clients Providers Settings Help Sign Out v. 13

HUD Program Intake
Initial Family Member

Assessment
Barriers / Special Needs
Domestic Violence
Income
Non-Cash Benefits
Child Education
Health
Transportation

Case Management
Client Dashboard
Edit Client
Family Members
Enrollments
Assessments
Crimes
Protection Orders
Services
Referrals
Case Notes
Hotline Calls
Paused Workflows

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Assessment Active

Assessment Date: 10/02/2013
Income Received: Yes
Non-cash Benefits: Yes
Income Group: Non-cash Benefit

12 records found.

Type	Description	Monthly Amount
<input type="checkbox"/>	Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)	
<input checked="" type="checkbox"/>	MEDICAID	
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	State Children's Health Insurance Program	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	TANF Transportation Services	
<input type="checkbox"/>	Other TANF-funded Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Ongoing Rental Assistance	
<input type="checkbox"/>	Other Source	
<input type="checkbox"/>	Temporary rental assistance	
Count/Total Monthly Income:		1 \$0.00

Save Save and Close

9:23 PM 10/2/2013

Click “Save and Close” when completed.

Financial Assessment: Non-Cash Benefits

This section is specific to individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections which will pertain to children (Medicaid). When recording an amount be sure to record the **monthly amount**.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps). **MEDICAID** – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary.

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older.

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran's Administration Medical Services - Health care benefits and service provided for Veterans.

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.

Other Source – Any source not previously listed above.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?3FFormID%3D98%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%3Dfalse%3Dtrue%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

Home Clients Providers

HUD Program Intake

Enroll Family Member

Assessment

Barriers / Special Needs

Domestic Violence

Income

Non-Cash Benefits

Child Education

Health

Transportation

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Financial Assessment

Indicate below the client's sources of monthly income/benefits.

Enter Expenses

Assessment Active

Assessment Date: 10/02/2013

Income Received: Yes

Non-cash Benefits: Yes

Income Group: Non-cash Benefit

12 records found.

Type	Description	Monthly Amount
<input type="checkbox"/>	Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)	
<input checked="" type="checkbox"/>	MEDICAID	
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	State Children's Health Insurance Program	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	TANF Transportation Services	
<input type="checkbox"/>	Other TANF-funded Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Ongoing Rental Assistance	
<input type="checkbox"/>	Other Source	
<input type="checkbox"/>	Temporary rental assistance	
Count/Total Monthly Income:		1 \$0.00

Save Save and Close

Click **"Save and Close"** when completed.

Child Education Assessment

Enter the **"Highest Grade Completed"** for the child, and then select if the child is **"Currently Enrolled in School."** The built in logic may require further information depending on how you answer the questions. Click **"Save"** when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?InitialPage=2&InitialContent=https://ihcdaonline.com/2013/viewform.aspx?3FFormID%3D98%26CurrentPage%3D1%26FULLSEARCH%3DTrue%26Excel%3Dfalse%3Dfalse%3Dtrue%26AUTOSELECT%3DTrue%26PageID%3D2%26MenuID%3D380

Welcome Autumn Gale (Training)

Home Clients Providers

HUD Program Intake

Enroll Family Member

Assessment

Barriers / Special Needs

Domestic Violence

Income

Non-Cash Benefits

Child Education

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

Assessments

Crimes

Protection Orders

Services

Referrals

Case Notes

Hotline Calls

Paused Workflows

Child Education Assessment

Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter the school name. If the child is not enrolled, enter date of last enrollment and reasons why the child is not enrolled. Enter any additional comments.

Default Last Assessment

Assessment Active

Assessment Date: 10/02/2013

Highest Grade Completed: 5th Grade or 6th Grade

Current Enrollment Status: Yes

Type of School: Public School

School Name: School #42

Connected with McKinney-Vento School Liaison: No

Comments:

Health Assessment

The answer to this question is up to the client or the parent of the client. If you notice that they are not as they describe, then you would want to note that in your case notes. Click **“Save”** when completed.

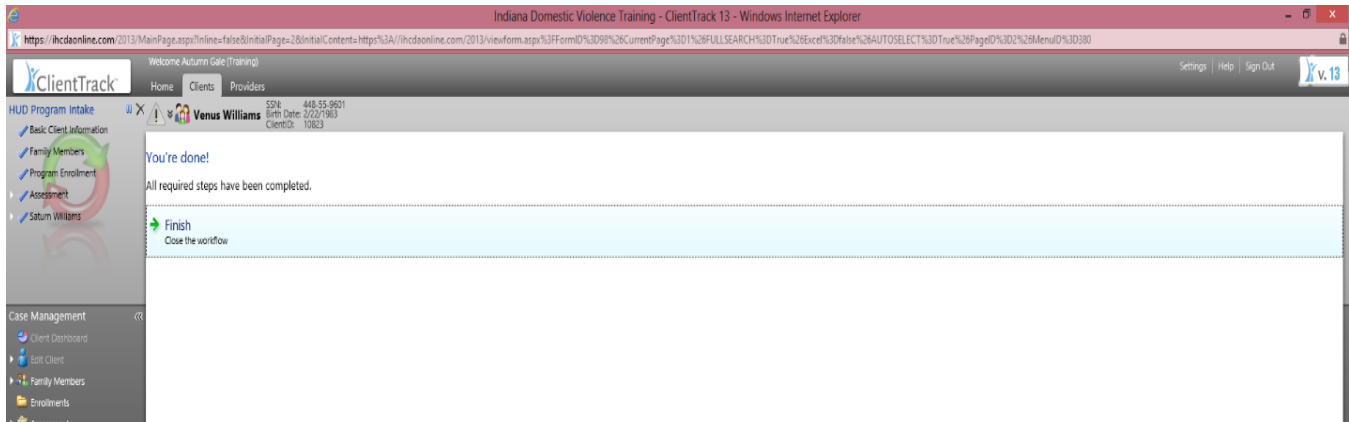
The screenshot shows the ClientTrack 13 web application in Internet Explorer. The page title is "Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer". The URL is "https://ihcdaonline.com/2013/MainPage.aspx?Online=false". The page displays the "Health Assessment" form for client "Saturn Williams" (SSN: 365-22-4444, Birth Date: 4/2/2003, ClientID: 10604). The form includes a sidebar with navigation links like "HUD Program Intake", "Assessment", "Barriers / Special Needs", "Domestic Violence", "Income", "Non-Cash Benefits", "Child Education", "Health", "Transportation", "Case Management", "Client Dashboard", "Edit Client", "Family Members", "Enrollments", "Assessments", "Crimes", "Protection Orders", "Services", "Referrals", and "Case Notes". The main content area shows the "Health Assessment" form with a "Default Client's Last Assessment" button. The form includes a "Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date." instruction. The "Assessment Date" is set to "10/2/2013" and the "General Health Status" is set to "Very Good".

Transportation Assessment

In order to bypass the Transportation Assessment for the children, click on **“Skip”** in the bottom right-hand corner of the screen. The Transportation Assessment allows you to record important information about your client’s transportation, vehicle specifics, license plate number, etc. This may be helpful information for your organization to collect for your records. Click **“Save”** when completed.

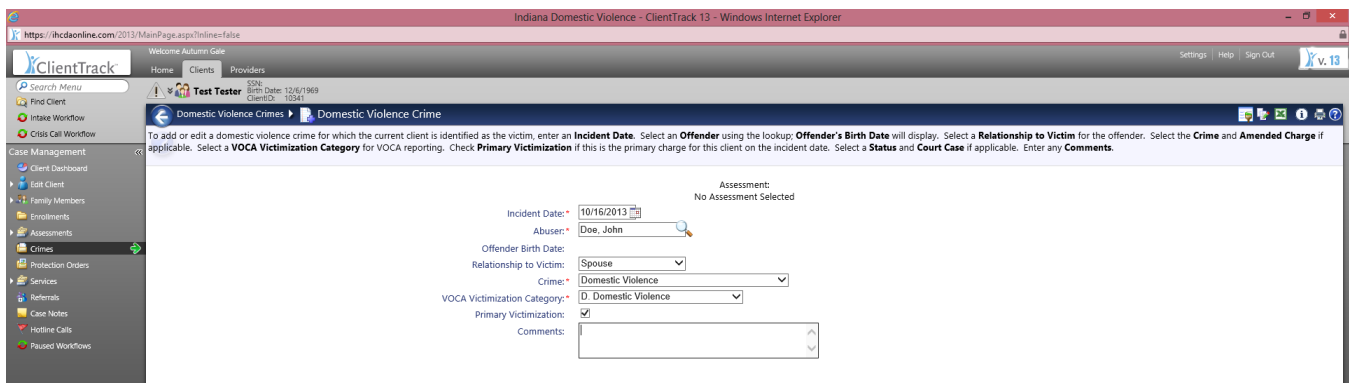
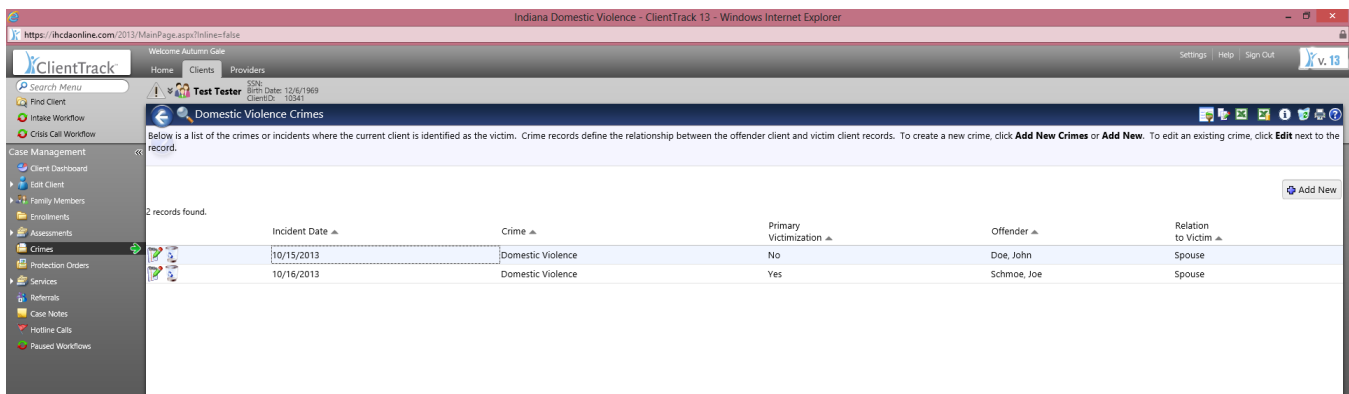
The screenshot shows the ClientTrack 13 web application in Internet Explorer. The page title is "Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer". The URL is "https://ihcdaonline.com/2013/MainPage.aspx?Online=false". The page displays the "Transportation Assessment" form for client "Missy Mack" (SSN: 000-00-0000, Birth Date: 1/1/2008, ClientID: 10651). The form includes a sidebar with navigation links like "Search Menu", "Find Client", "Intake Workflow", "Crisis Call Workflow", "Case Management", "Client Dashboard", "Edit Client", "Family Members", "Enrollments", "Assessments", "Barriers", "Chronic Homeless Assessments", "Domestic Violence", "Education - Adult", "Education - Child", "Employment", "Financial", "Family Development Matrix", "Health", "Legal Assessments", "Self Sufficiency Matrix", "Transportation Assessment", "Universal Data", "Veteran Assessments", "Work History/Employment", "Crimes", "Protection Orders", "Services", "Referrals", "Case Notes", "Hotline Calls", and "Paused Workflows". The main content area shows the "Transportation Assessment" form with a "Default Client's Last Assessment" button. The form includes a "Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date." instruction. The "Assessment Date" is set to "10/04/2013" and the "Primary Transit Means" is set to "Own Vehicle". The "Vehicle" section includes fields for "Vehicle Ownership" (Own), "Vehicle Make" (Honda), "Vehicle Model" (Civic), "Vehicle Year" (2002), "Vehicle Description", "Vehicle Condition" (In need of repair), "Vehicle Condition Description", "Registered State" (FL), "License Plate Number", "Insurance Company", and "Insurance Renewal Date". The "Drivers License" section includes fields for "License Number", "License State" (SELECT), and "License Expiration Date".

All steps for the assessment and enrollment process have been completed. Upon clicking the **“Finish”** button, you will be redirected to the Dashboard for the Head of Household. It is from this screen you will begin to add services and case notes regarding the DV Program Enrollment.

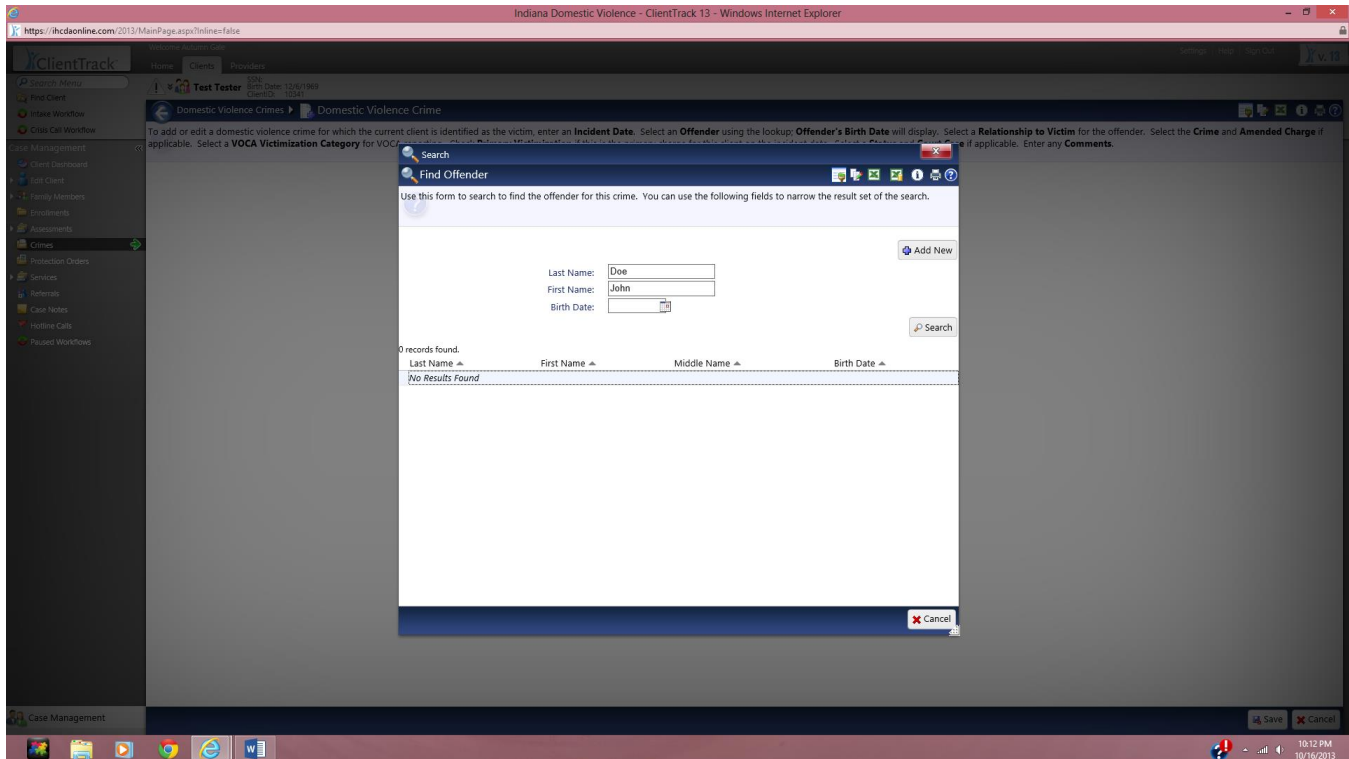


Documenting Crimes and Protection Orders

ClientTrack™ provides tools outside of the workflow for documenting the offender’s crime against your client and any protection orders in process or in place. To document an incident with an offender, click on **“Crimes”** on the left-hand side of the client dashboard in the list of Menu Items. Click on the **“Add New”** button found in the upper right-hand corner of the screen to document a new incident.

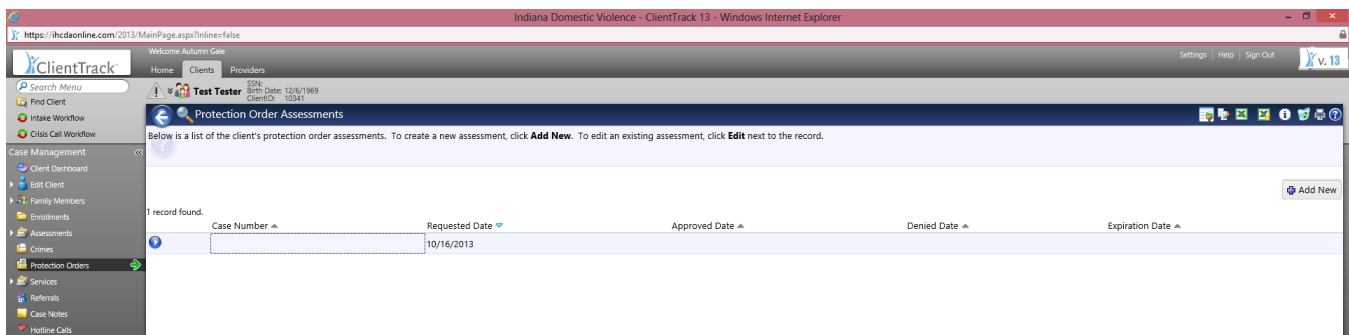


Complete the information. When you enter the name of the offender, the system will conduct an automatic search. If the offender is already in the system, you can select the offender from the search list. If the offender is not in the system, you will **“Add New”** and complete the offender’s information to add the offender to the database. Be sure to include a birth date so you can later identify the appropriate offender when conducting a search.



When you have added the offender to the system, complete the rest of the “Crimes” information and click **“Save”** when you are finished.

To document Protection Orders, click on **“Protection Orders”** on the left-hand side of the client dashboard in the list of Menu Items. Click on **“Add New”** in the upper right-hand corner of the screen to add a new protection order documentation.



Indiana Domestic Violence - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale

Home Clients Providers

Search Menu

- Find Client
- Intake Workflow
- Crisis Call Workflow

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Enrollments
- Assessments
- Crimes
- Protection Orders
- Services
- Referrals
- Case Notes
- Hotline Calls
- Paused Workflows

Test Tester SN: Birth Date: 12/6/1969 ClientID: 10341

Protection Order Assessments > Personal Protection Order Application

To add or edit the client's protection order select a **PPO Type** which is defaulted. Enter in a **requested date**, enter a **Case Number**, and other dates as applicable. Indicate if the order is Responded to Within 24 Hours and if this is the **First Time Filing a PPO**. Also select they **Type of Victimization**.

Assessment: No Assessment Selected

PPO Type: Restraining

Case Number: DG4420-11

Requested Date: 10/14/2013

Approved Date: 10/16/2013

Denied Date:

Expiration Date: 10/14/2014

First Time Filing a PPO: ☒ Yes ☐ No

PPO Status: Agency assisted with PPO

Type of Victimization: Domestic Violence

Save Cancel

Complete the information and click **"Save"** to record the protection order.

You can also record any hearings associated with your client and the protection order. To document a hearing, click on the blue play button beside the protection order associated with the hearing. Select **"Hearings"** in the drop down list.

Indiana Domestic Violence - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale

Home Clients Providers

Search Menu

- Find Client
- Intake Workflow
- Crisis Call Workflow

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- Assessments
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- Protection Orders
- Services
- Referrals
- Case Notes
- Hotline Calls
- Paused Workflows

Test Tester SN: Birth Date: 12/6/1969 ClientID: 10341

Protection Order Assessments

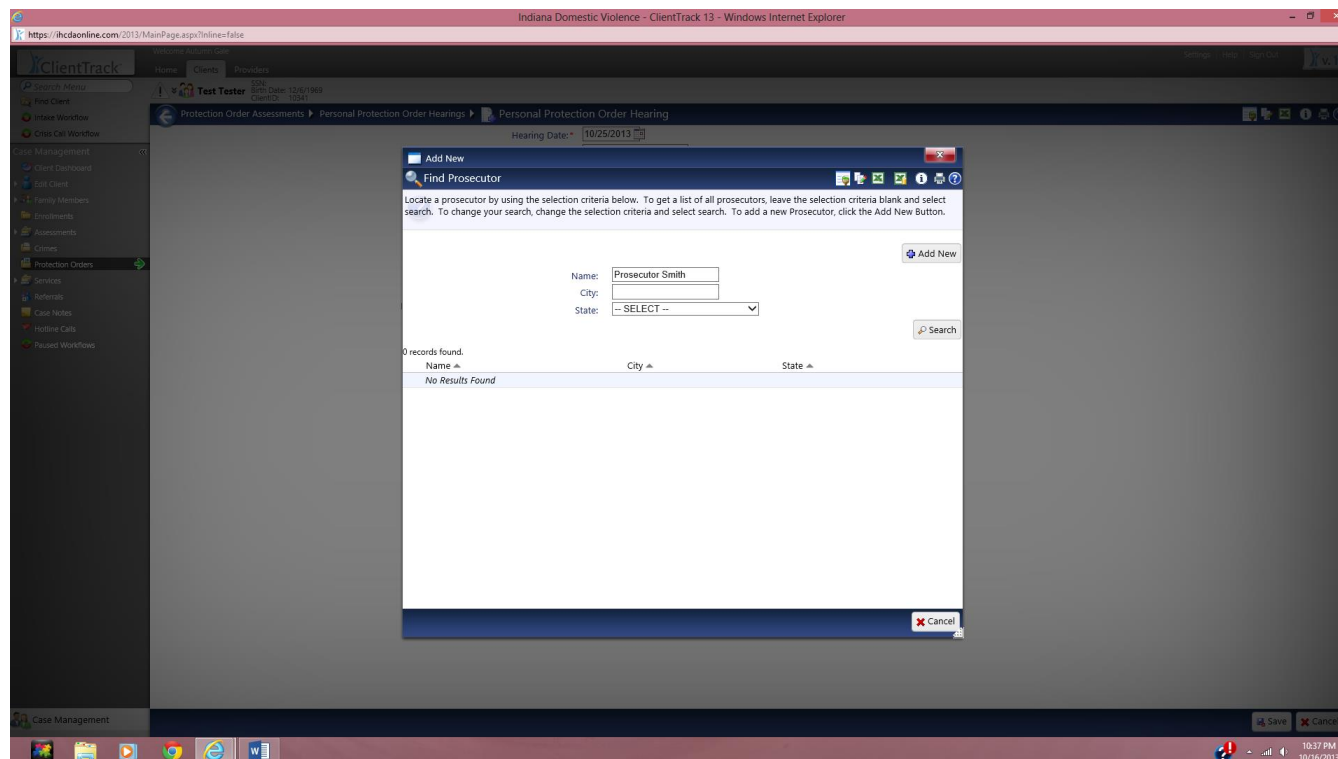
Below is a list of the client's protection order assessments. To create a new assessment, click **Add New**. To edit an existing assessment, click **Edit** next to the record.

2 records found.

	Case Number ▲	Requested Date ▼	Approved Date ▲	Denied Date ▲	Expiration Date ▲
Edit	4420-11	10/16/2013			
Hearings		10/14/2013	10/16/2013		10/14/2014
Delete					

Add New

After clicking on “Hearings,” click on **“Add New”** to document a new hearing. Complete the information and save. You can add the Judge’s and Prosecutor’s name to the database. When you enter a name in the **“Judge”** or **“Prosecutor”** box, the system will automatically search for the name in the database. If the Judge or Prosecutor is already in the system, you can select him or her from the search list. If they are not in the system, you can add them to the database by clicking on **“Add New.”**



Click the **“Save”** button when you have completed the hearing information.

Client Dashboard

The Client Dashboard provides you with a great deal of information regarding the client. You can verify the basic client demographics, see the enrollment in a particular program, number of case members, enrollment date, the associated organization and when their last Assessment has been completed. It will also provide you with an “at a glance” look at the services the client has received.

While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated. The screen shots that follow will help you access a previously completed assessment should you need to make corrections.

The screenshot displays the ClientTrack software interface. The top navigation bar includes 'Home', 'Clients', and 'Providers'. The sidebar on the left contains a 'Search Menu' with options like 'Find Client', 'Intake Workflow', and 'Crisis Call Workflow', followed by a 'Case Management' section with options like 'Client Dashboard', 'Edit Client', 'Family Members', 'Enrollments', 'Assessments', 'Crimes', 'Protection Orders', 'Services', 'Referrals', 'Case Notes', 'Hotline Calls', and 'Paused Workflows'. The main content area is titled 'Venus Williams's Dashboard'. It features a 'Venus Williams's Information' section with fields for Name (Williams, Venus), Gender (Female), Birth Date (2/22/1983), Age (30), Disabling Condition (No), Veteran (Yes), Ethnicity (Non-Hispanic/Latino), and Race (Black or African American). Below this is a 'Photo' placeholder. The 'Venus's Enrollments' section contains a table with columns: Enrollment Description, Case Members, Enroll Date, Exit Date, Organization, Last Assessment Completed, Enroll ID, and Exit ID. The table shows one current enrollment: 'ESG - Albion Fellows DV Shelter' with 2 case members, enrolling on 10/02/2013, at the 'Albion Fellows Bacon Center', with the last assessment completed on 10/02/2013 and an enroll ID of 6747. Below the enrollments is a 'Venus's Case Manager Assignments' table with columns: Case Manager, Begin Date, Status, End Date, and Enrollment. It shows an assignment to 'Autumn Gale' starting on 10/02/2013, with a status of 'Active' and enrollment at 'ESG - Albion Fellows DV Shelter'. At the bottom, the 'Venus's Services' section shows 'No Results Found'.

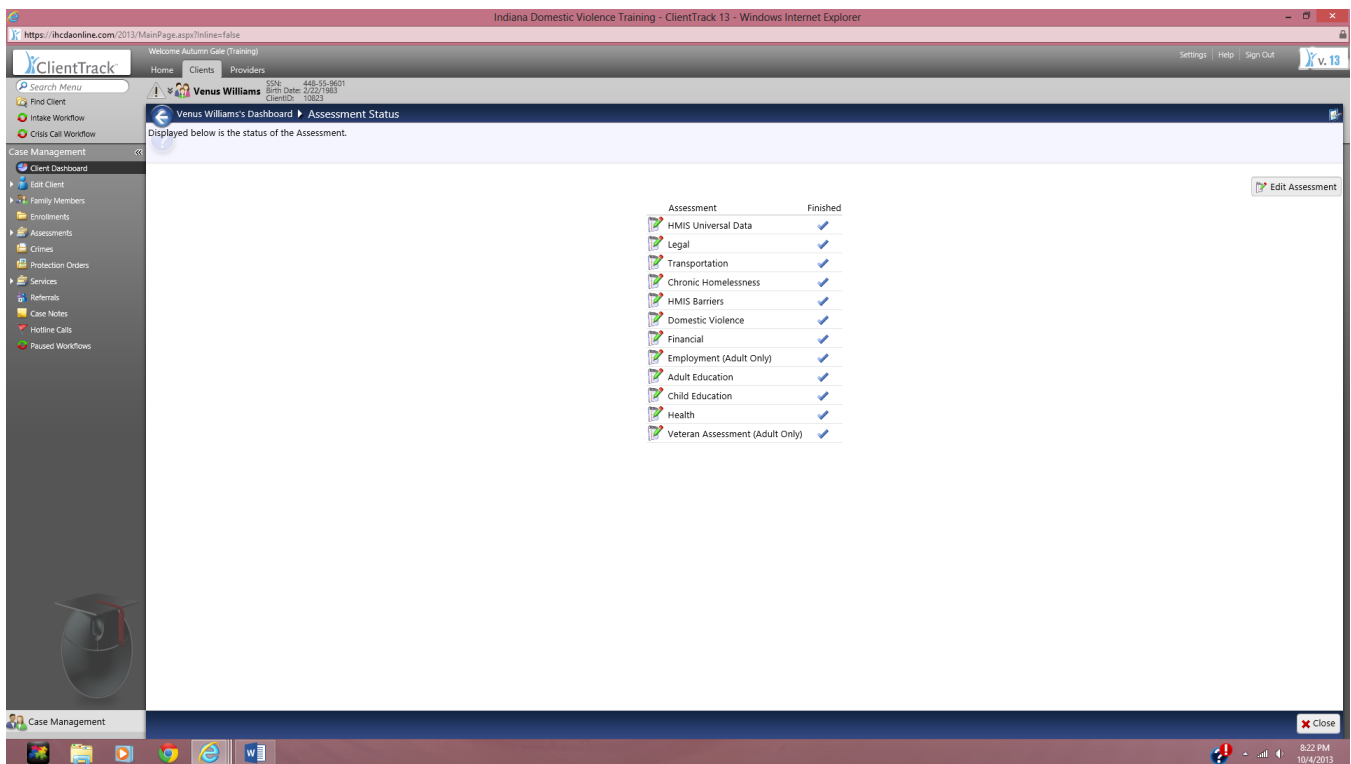
Click on the **“Enrollment”** menu item on the left or click on the blue play button under **“Client Name Enrollments”** to produce a drop down menu where you can:

- Edit Enrollment (maybe the date needs to be changed, etc.)
- View Case Members
- Case Summary Report
- Review Entry or Exit Assessments
- Perform During Program Enrollment Assessment
- Exit the Enrollment

Household Note: Household member icons are color-coded

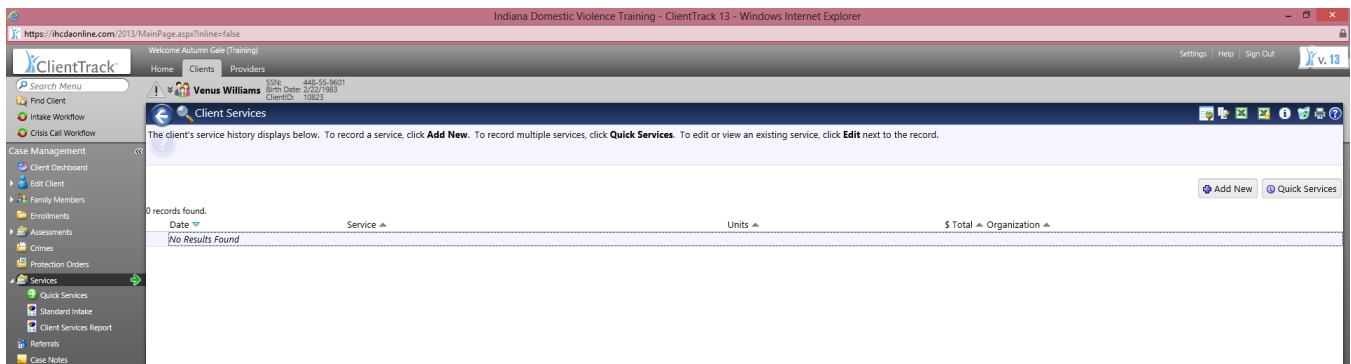
- Adult male household members have a blue icon
- Adult female household members have a pink icon
- Children have a green icon

As you can see on the screen shot on page 36 when you select **“Review Entry Assessments,”** all required assessments have been completed. For instance, if a client does not disclose at entry they are receiving food stamps but you find out soon after their enrollment, you would want to **EDIT** the Financial Assessment (To **“Edit”** an assessment click on the **“Notepad with the Green Pencil,”** put in the updated information, and click **“Save”**). However, if the client **BEGAN** receiving Food Stamps while enrolled in your program (1-2 months later); **DO NOT** edit the entry assessment. This is a time to complete a **“During Program Enrollment Assessment”** (this will be covered later in the manual).



Adding Services

To add services go to the left-hand menu items, and then click on the “**Services**” link, this will open the Services Window.



Click on the “**Add New**” Button. **Please note** that you may have the option to Add Quick Services (for use when you are adding multiple services for a client that were performed on the same day). For services that may require some additional information, use the Add New button.

You now see the **Services Screen**, you will need to **select your grant, enrollment, and the service provided**. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not the area to write your case notes. Case Notes will be covered later in the manual. When you are finished documenting services click on the “**Save**” Button.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

Search Menu

Find Client

Intake Workflow

Crisis Call Workflow

Case Management

Client Dashboard

Edit Client

Family Members

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Crimes

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Services

Quick Services

Standard Intake

Client Services Report

Referrals

Case Notes

Hotline Calls

Paused Workflows

Client Services > Service

Enter the information about the service provided to the client below. The grant will be used to link the service to the grant for APR purposes while the Enrollment selected will be used to determine the Episode of Service. Only enrollments into a program will appear in this list.

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$1,200.00	\$1,874.00	2	\$1,260.83	148.63 %

Grant: ESG

Enrollment: 10/02/2013 - Albion Fellows DV Shelter

Service: Case Management

Provider: Albion Fellows Bacon Center

Location: Albion Fellows Bacon Center

Date: 10/04/2013

Units: 1.00

Unit Value: \$0.00

Total: \$0.00

User Performing the Service: Autumn Gale

Comments:

Once you have clicked on the **“Save”** Button, you will be brought back to the Service home screen, from here you are able to edit or delete a service that you provided.

Quick Services

When you are adding more than one service on a client and the services were provided on the same date, the easiest way to document them will be to use the **“Quick Services”** button located at the top right corner of your screen next to the **“Add New”** button. With this feature you will be able to add multiple services to a client at one time. You will need to select your **“Grant and Enrollment,”** as well as the **“Check Box”** next to the Service you provided. Once you are finished adding services click on the **“Save & Close”** Button.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

Search Menu

Find Client

Intake Workflow

Crisis Call Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Enrollments

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Crimes

Protection Orders

Services

Quick Services

Standard Intake

Client Services Report

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Quick Service

Use the Service Screen list to filter services available. Select the services the client has received and verify the Units and Unit Values.

Date: 10/04/2013

Grant: ESG

Enrollment: 10/02/2013 - Albion Fellows DV Shelter

User Performing the Service(s): Autumn Gale

4 records found.

Service	Units	Unit Value	Total	EndDate	Comments	Help
<input checked="" type="checkbox"/> Bus Pass	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Crisis Intervention	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Case Management	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Childcare	1.00	\$0.00	\$0.00			
	1.00	\$0.00	\$0.00			

Save Save & Close Cancel

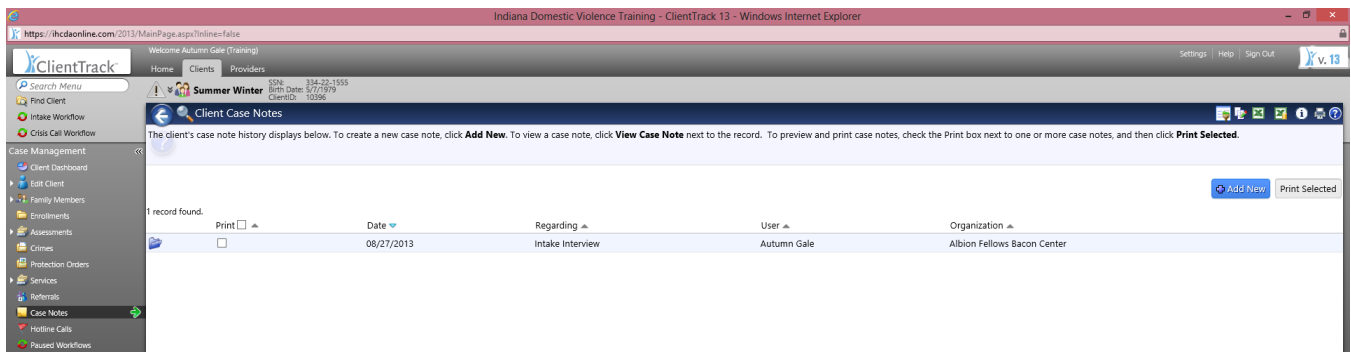
Case Management

8:27 PM 10/4/2013

Case Notes

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls, and other relevant information regarding your client are properly documented in their case notes.

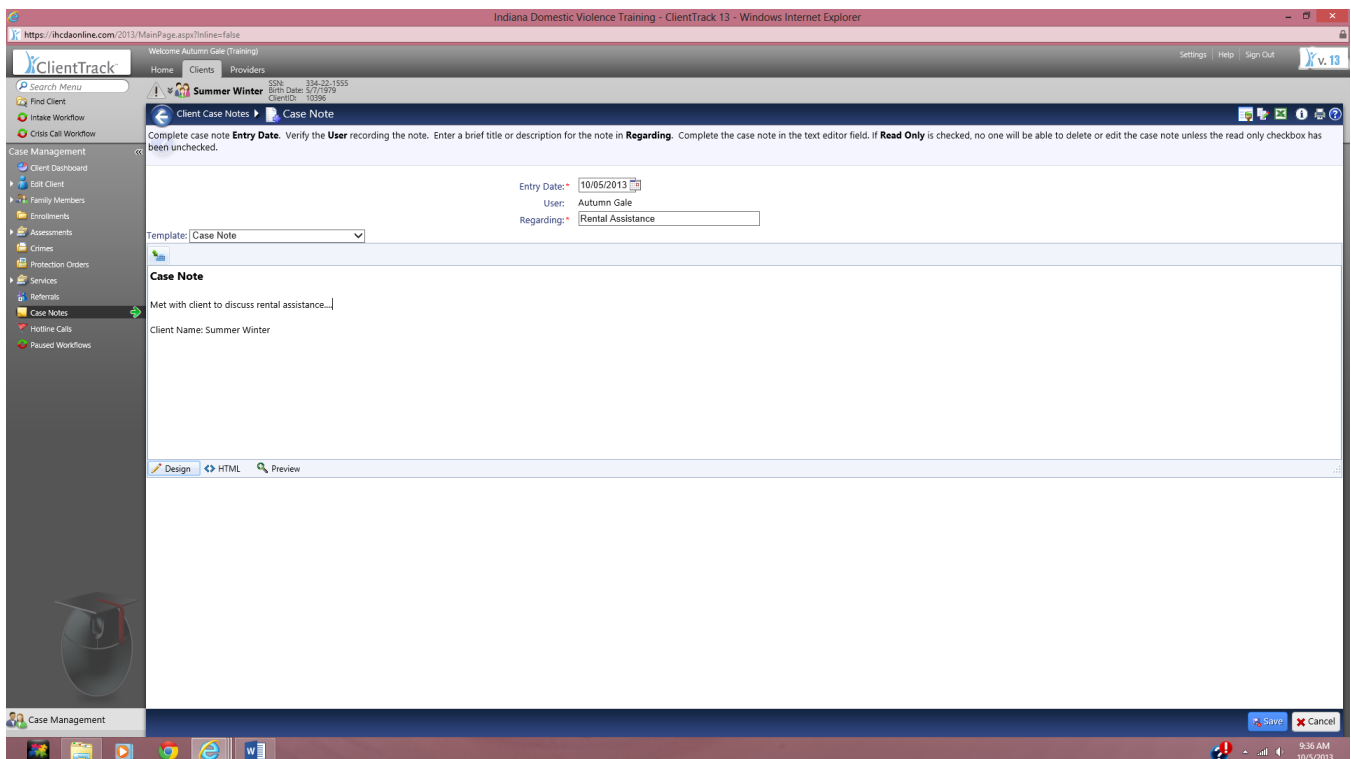
To add Case Notes, click on the “**Case Notes**” Menu Item on the left-hand side of the screen. Click on the “**Add New**” button on the upper right hand side of the screen. Remember, these case notes will be restricted to case managers in your organization so if you are apt to use abbreviations, make sure others in your agency will be able to decipher what you have written.



Once a case note is created and saved, you cannot edit or delete the case note. If you need to make changes, create a new case note with the corrections or new information.

Here is an example of Case Notes:

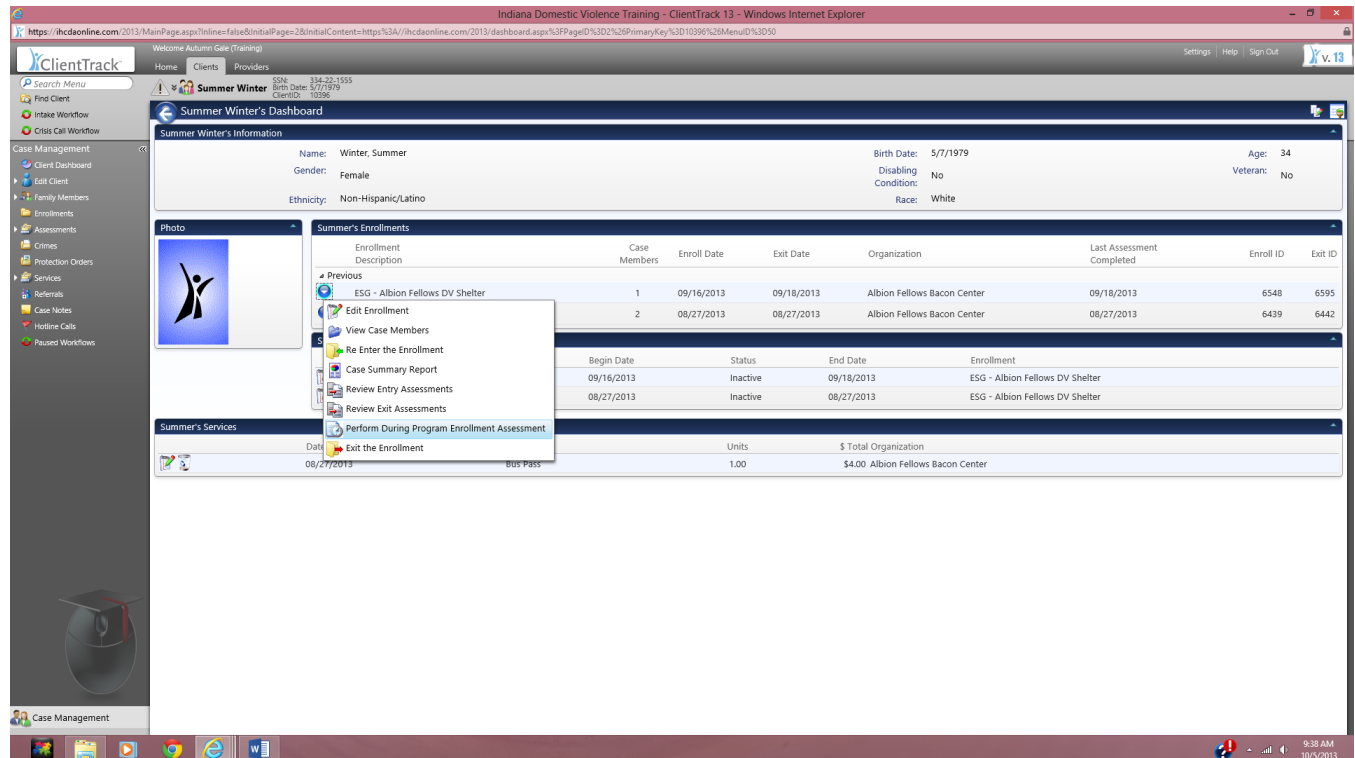
Once you have added your Case Notes click on the “**Save**” button at the bottom of the screen. You will be re-directed to the Case Notes screen, where you will be able to print your case notes.



During Program Enrollment Assessment

For clients who spend longer periods of time in your program, you now have access to a **“During Program Enrollment Assessment.”** This assessment is now required if you have clients in your program for a year or longer. You may also want to complete this assessment if you have a new member (birth of a child) to the household or if someone in the household departs (divorce) your program. You can also use this workflow to track and maintain significant changes to a household income, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

To perform a During Program Enrollment Assessment click on either the **“Enrollments”** link on the left-hand menu area, or you can click on the blue play button under **“Client Name Enrollments.”**



The screenshot shows the ClientTrack 13 web application interface. The top navigation bar includes links for Home, Clients, and Providers. The left sidebar contains a search menu and a case management menu. The main content area displays the Summer Winter's Dashboard, which includes a client information section, a photo, and a list of enrollments. A dropdown menu is open under the 'Enrollments' section, showing options like 'Previous', 'Edit Enrollment', 'View Case Members', 'Re Enter the Enrollment', 'Case Summary Report', 'Review Entry Assessments', 'Review Exit Assessments', and 'Perform During Program Enrollment Assessment'.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
ESG - Albion Fellows DV Shelter	1	09/16/2013	09/18/2013	Albion Fellows Bacon Center	09/18/2013	6548	6595
	2	08/27/2013	08/27/2013	Albion Fellows Bacon Center	08/27/2013	6439	6442

Begin Date	Status	End Date	Enrollment
09/16/2013	Inactive	09/18/2013	ESG - Albion Fellows DV Shelter
08/27/2013	Inactive	08/27/2013	ESG - Albion Fellows DV Shelter

Date	Units	\$ Total Organization
08/27/2013	1.00	\$4.00 Albion Fellows Bacon Center

Click the **“Blue Play Button”** and then click on **“Perform During Program Enrollment Assessment”** in the drop down list and this will launch a During Program Enrollment Assessment Workflow. For your convenience, the assessment has been developed as a workflow with the following steps (for more detailed instructions look back at enrolling a client):

1. Verify and make any necessary changes to basic client information
2. Verify and make any necessary changes to household information
3. Master Assessment-During Program Enrollment is completed
 - a. Review of Barriers
 - b. Financial Assessment (Cash and Non-cash)
 - c. Employment Assessment
 - d. Education Assessment
 - e. Health Assessment
 - f. Legal Assessment

- g. Transportation Assessment
- h. Perform Household Members Assessments
4. Continue assessment with additional household members who are also enrolled in the program
5. Click **“Finish”** and you will be redirected to the Client Dashboard

Exit Client

To **“Exit”** a client from the program/enrollment, you can either click on the **“Enrollments”** link on the left-hand menu bar. This will take you to the **“Enrollments”** screen. You can also access the enrollment by clicking on the blue play button under **“Client Name Enrollments.”** Click on the folder icon with the red arrow named **“Exit the Enrollment.”** This will launch an Exit Workflow.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
ESG - Albion Fellows DV Shelter	2	10/05/2013		Albion Fellows Bacon Center	10/05/2013	6756	
ESG - Albion Fellows DV Shelter	1	09/16/2013	09/18/2013	Albion Fellows Bacon Center	09/18/2013	6548	6595
ESG - Albion Fellows DV Shelter	2	08/27/2013	08/27/2013	Albion Fellows Bacon Center	08/27/2013	6439	6442

Next, you will need to fill in the **“Exit Date,”** if you are doing back-data entry you will need to ensure the date is correct. Then you will fill in the Destination of the client as well as the Exit Reason. To remove someone from your Case Assignment, click on the check box next to **“End Case Assignment.”**

Exit Date: 08/25/2013

Destination: Transitional Housing for homeless persons (including homeless youth)

Exit Reason: Completed Program

Case Manager Assignment: Autumn Gale

End Case Assignment: ☒

Universal Data Assessment at Exit

Fill in the Housing Status at exit for the client.

Literally Homeless – Individual or household who lacks a fixed, regular, and adequate nighttime residence

Unstably Housed – at risk of losing their housing

Imminently losing their housing – individual or household who will imminently lose their primary nighttime residence (within 14 days)

Stably Housed – Rent

Stably Housed – Own

Don't Know – Client has left and you don't know where they have gone

Refused – Client refused to give you any information

Other – Any housing status that is not above.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https://ihcdaonline.com/2013/dashboard.aspx?SPPageID%3D%26PrimaryKey%3D10396%26MenuID%3D50

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

SSN: 134-22-1555
Birth Date: 5/7/1979
ClientID: 10396

Settings Help Sign Out v. 13

HUD Program Exit
Exit Enrollment
Universal Data
Barriers / Special Needs
Income
Non-Cash Benefits
Employment
Education
Legal
Transportation

Case Management
Client Dashboard
Edit Client
Family Members
Enrollments
Assessments
Crimes
Protection Orders
Services
Referrals
Case Notes
Hotline Calls
Paused Workflows

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Default Client's Last Assessment
Default Information From Head of Household

Assessment Active

Assessment Date: 10/05/2013

Housing Status - For each client, determine whether the client is: literally homeless; imminently losing their housing; unstably housed and at-risk of losing their housing; or in a stable housing situation. A client cannot be in multiple reporting categories.

Housing Status: Stably Housed - Rent

You will now be required to complete the Barriers Assessment. The built in logic may create additional fields that are required. All fields with a red * are required. Only select a barrier by clicking on the box beside it if a barrier is present. If the client has no barriers, click on the **"No Barriers"** button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **"Save & Close"** when completed.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https://ihcdaonline.com/2013/dashboard.aspx?SPPageID%3D%26PrimaryKey%3D10396%26MenuID%3D50

Welcome Autumn Gale (Training)

ClientTrack

Home Clients Providers

SSN: 134-22-1555
Birth Date: 5/7/1979
ClientID: 10396

Settings Help Sign Out v. 13

HUD Program Exit
Exit Enrollment
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Barriers

The selected client's barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Assessment Active

	Barrier	Help	Barrier Present*	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
<input type="checkbox"/>	Alcohol Abuse	?	-- SELECT --				
<input type="checkbox"/>	Chronic Health Condition	?	-- SELECT --				
<input type="checkbox"/>	Developmental Disability	?	-- SELECT --				
<input type="checkbox"/>	Drug Abuse	?	-- SELECT --				
<input type="checkbox"/>	HIV/AIDS	?	-- SELECT --				
<input type="checkbox"/>	Mental Health	?	-- SELECT --				
<input type="checkbox"/>	Physical Disability	?	-- SELECT --				

0

Financial Assessment: Cash Benefits at Exit

An Income Assessment will be completed for EACH household member. Income received by a household member such as child support, TANF, WIC, and food stamps should be designated on the assessment of the household member who directly receives the payment. If an adult receives an SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment and the **monthly amount** is recorded.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

The screenshot shows the 'Financial Assessment' form in the ClientTrack system. The client is Summer Winter, SSN: 334-22-1555, born 5/7/1979, client ID 10296. The assessment date is 10/05/2013, and income received is 'Yes'. The income group is 'Cash Income'. The form lists 15 records of income sources. The first record, 'Earned Income (i.e., employment income)', is checked and has a monthly amount of \$1,200.00. The other 14 records are unchecked. The total monthly income is \$1,200.00.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Earned Income (i.e., employment income)	\$1,200.00
<input type="checkbox"/>	Unemployment Insurance	
<input type="checkbox"/>	Supplemental Security Income (SSI)	
<input type="checkbox"/>	Social Security Disability Income (SSDI)	
<input type="checkbox"/>	Veteran's Disability Payment	
<input type="checkbox"/>	Private Disability Insurance	
<input type="checkbox"/>	Worker's Compensation	
<input type="checkbox"/>	Temporary Assistance for Needy Families (TANF)	
<input type="checkbox"/>	General Assistance	
<input type="checkbox"/>	Retirement income from Social Security	
<input type="checkbox"/>	Veteran's Pension	
<input type="checkbox"/>	Other Pension	
<input type="checkbox"/>	Child Support	
<input type="checkbox"/>	Alimony or other spousal support	
<input type="checkbox"/>	Other Income	

Click **"Save and Close"** when completed.

Financial Assessment: Non-Cash Benefits at Exit

This section is specific to an individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections that will pertain to children (Medicaid). When recording an amount be sure to record the **monthly amount**.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps).

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary.

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older.

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans.

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.

Other Source – Any source not previously listed above.

Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer

https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https://ihcdaonline.com/2013/dashboard.aspx?3FPageID%3D2%26PrimaryKey%3D10396%26MenuID%3D50

Welcome Autumn Gale (Training)

Home Clients Providers

ClientTrack

Summer Winter SSN: 334-22-1553 Birth Date: 5/7/1979 ClientID: 1026

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Enter Expenses

Assessment Active

Assessment Date: 10/05/2013

Income Received: Yes

Non-cash Benefits: Yes

Income Group: Non-cash Benefit

12 records found.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)	\$200.00
<input type="checkbox"/>	MEDICAID	
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	State Children's Health Insurance Program	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	TANF Transportation Services	
<input type="checkbox"/>	Other TANF-funded Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Ongoing Rental Assistance	
<input type="checkbox"/>	Other Source	
<input type="checkbox"/>	Temporary rental assistance	

Count/Total Monthly Income: 1 \$200.00

Save Save and Close

Case Management

9:31 AM 10/5/2013

Click **"Save and Close"** when completed.

Employment Assessment at Exit

When filling out the Employment Assessment, be aware that the built in logic may require you to fill out additional information. Click **“Save”** when completed.

The screenshot shows the ClientTrack 13 web application interface. The left sidebar contains a navigation menu with options like HUD Program Exit, Universal Data, Income, Non-Cash Benefits, Employment, Education, Legal, Transportation, Case Management, Client Dashboard, Edit Client, Family Members, Enrollments, Assessments, Crimes, Protection Orders, Services, Referrals, Case Notes, Hotline Calls, and Paused Workflows. The main content area is titled "Employment Assessment" and includes a "Default Last Assessment" button. Below this, there is a section for "Assessment Active" with the following fields: "Assessment Date" (10/05/2013), "Employed?" (Yes), "Hours Worked in Last Week" (25.00), "Employment Tenure" (Permanent), and "Looking for additional employment / increased hours" (Yes).

Adult Education Assessment at Exit

When filling out the Adult Education Assessment, remember that certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, that you have selected **“Post-Secondary School”** and then select **“None”** in the Secondary Education box. Click **“Save”** to continue.

The screenshot shows the ClientTrack 13 web application interface. The left sidebar contains a navigation menu with options like HUD Program Exit, Universal Data, Income, Non-Cash Benefits, Employment, Education, Legal, Transportation, Case Management, Client Dashboard, Edit Client, Family Members, Enrollments, Assessments, Crimes, Protection Orders, Services, Referrals, Case Notes, Hotline Calls, and Paused Workflows. The main content area is titled "Adult Education Assessment" and includes a "Default Client's Last Assessment" button. Below this, there is a section for "Assessment Active" with the following fields: "Assessment Date" (10/05/2013), "Currently in School / Working on Degree" (No), "Received Vocational Training/Apprenticeship" (No), "Highest Grade Completed" (High school diploma), and "Secondary Education" (None).

Legal Assessment at Exit

Complete the Legal Assessment to record any changes since the initial intake. Click **“Save”** when completed.

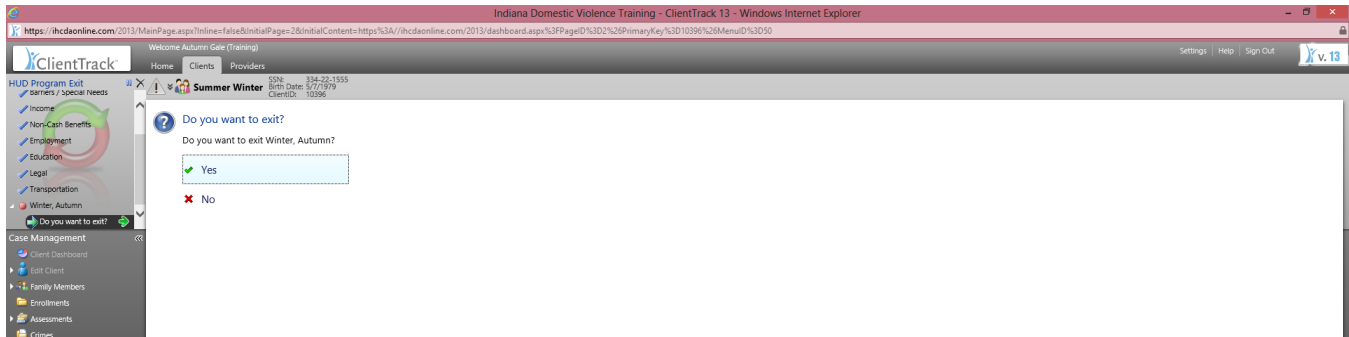
The screenshot shows the ClientTrack 13 web application in Internet Explorer. The browser address bar displays the URL: <https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https%3A%2F%2Fihcdaonline.com%2F3FPageD%3D%2F%26PrimaryKey%3D10396%26MenuD%3D50>. The page title is "Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer". The ClientTrack logo is in the top left. The top navigation bar includes "Home", "Clients", and "Providers". The client information bar shows "Summer Winter", SSN: 334-22-1555, Birth Date: 5/7/1979, and ClientID: 10396. The left sidebar contains a "HUD Program Exit" section with links to "Exit Enrollment", "Universal Data", "Barriers / Special Needs", "Income", "Non-Cash Benefits", "Employment", "Education", and "Legal". Below this is a "Case Management" section with links to "Client Dashboard", "Edit Client", "Family Members", "Enrollments", "Assessments", "Crimes", "Protection Orders", "Services", "Referrals", "Case Notes", "Hotline Calls", and "Paused Workflows". The main content area is titled "Legal Assessment" and contains the following sections: "Legal Assessment - Describe the Client's current legal situation." with a "Default Last Assessment" button; "Assessment Active" with "Date of Assessment:" set to 10/05/2013 and an empty "Assessment Description:" field; "Legal Situations - Are you currently involved in any of the following legal situations?" with a list of checkboxes: Divorce, Eviction, Bill Collector (checked), Pending Criminal Charges, Order of Protection (checked), Probation / Parole, Custody Issues, Child or Spousal Support, Warrant for Arrest, CPS Involvement, and Other; "Other Legal Questions" with "Do You Currently Have Legal Representation:" checked and "How Many Days, Past 30 Days, experiencing Legal Pr:" set to 49; and "Legal Notes - Please describe any other Legal information you think we should be aware of." with an empty "Legal Description Notes:" field.

Transportation Assessment at Exit

Complete the Transportation Assessment to record any changes since the initial intake. Click **“Save”** when completed.

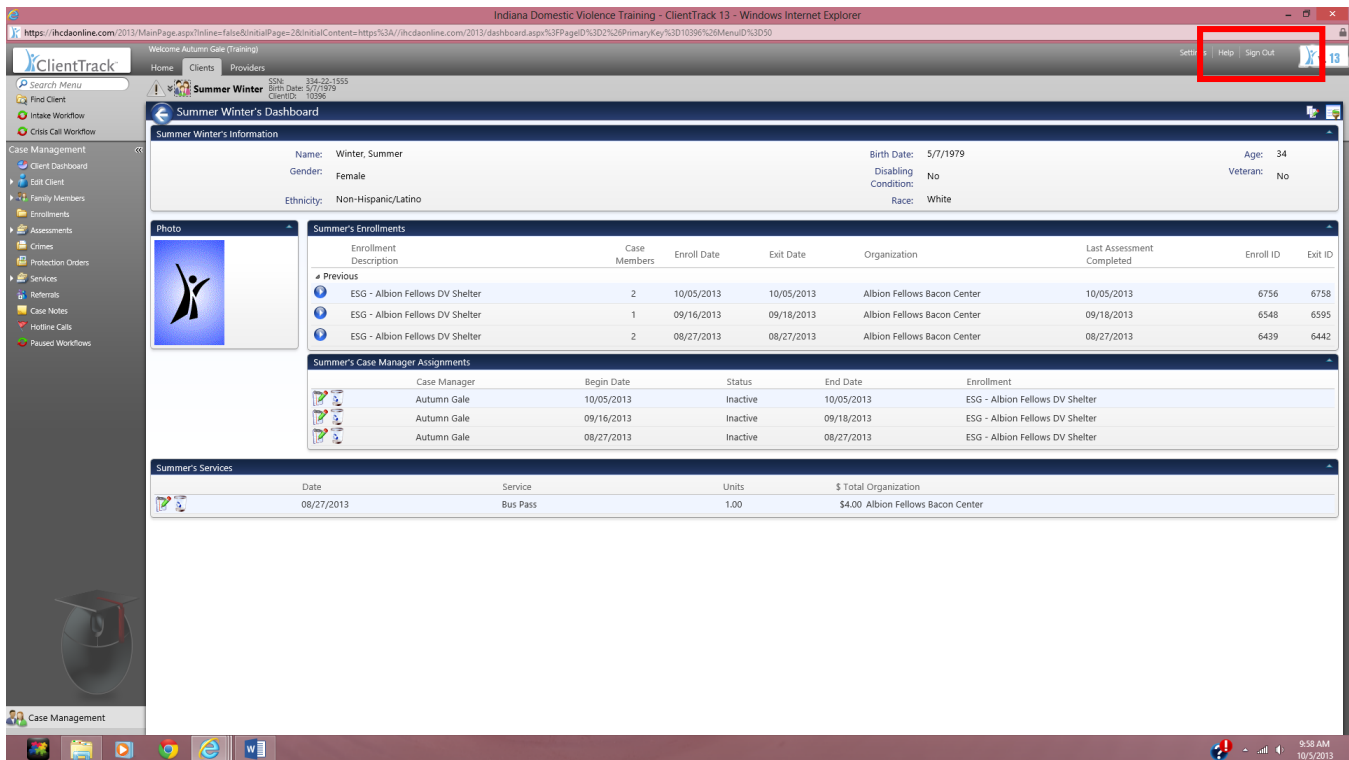
The screenshot shows the ClientTrack 13 web application in Internet Explorer. The browser address bar displays the URL: <https://ihcdaonline.com/2013/MainPage.aspx?inline=false&initialPage=2&initialContent=https%3A%2F%2Fihcdaonline.com%2F3FPageD%3D%2F%26PrimaryKey%3D10396%26MenuD%3D50>. The page title is "Indiana Domestic Violence Training - ClientTrack 13 - Windows Internet Explorer". The ClientTrack logo is in the top left. The top navigation bar includes "Home", "Clients", and "Providers". The client information bar shows "Summer Winter", SSN: 334-22-1555, Birth Date: 5/7/1979, and ClientID: 10396. The left sidebar is identical to the previous screenshot. The main content area is titled "Transportation Assessment" and contains the following sections: "Transportation Assessment" with a "Default Client's Last Assessment" button; "Assessment Active" with "Assessment Date:" set to 10/05/2013 and "Primary Transit Means:" set to "Own Vehicle"; "Vehicle - In the section below, enter details about the client's vehicle if they have one." with fields for "Vehicle Ownership:" (Own), "Vehicle Make:" (Honda), "Vehicle Model:" (Civic), "Vehicle Year:" (2002), "Vehicle Description:" (empty), "Vehicle Condition:" (In need of repair), "Vehicle Condition Description:" (Broken headlight), "Registered State:" (IL), "License Plate Number:" (TTT222), "Insurance Company:" (Insurance Co.), and "Insurance Renewal Date:" (10/01/2014); and "Drivers License - If the client has a driver's license, please enter this information in the section below. If they do not have a driver's license, skip this section." with fields for "License Number:" (000-00-0001), "License State:" (IL), and "License Expiration Date:" (10/01/2014).

The exit workflow will ask you if you want to exit to confirm completion of the exit workflow and the exit of the client. Click **“Yes”** to exit the client. Click the **“Yes”** Button to exit the next household member, and so on until all members are exited from the program. You will then be re-directed to the Client Dashboard.



Log Out of ClientTrack™

To log out of ClientTrack™, click on the **“Sign Out”** link at the top right hand corner of your screen.



How to Contact the Help Desk

- Email the help desk at DVHelpDesk@ihcdaonline.com
- Include:
 - Your Name
 - Contact Phone Number
 - Agency Name
 - Program you are working with
 - A description of the issues you are having (only send client ID number if applicable)
- Allow 1– 2 business days to receive a response.

Notes

- Please remember the **“Save”** button will save the changes you made to the screen and leave you on the same page. The **“Save & Close”** button will save the changes you have made to the screen and move you to the next one.
- IHCDCA will monitor time between user logins and your ClientTrack™ account will be deactivated after 30 days of inactivity.
- Grant and program information must be set up in the system before you can begin to enroll clients. You must give adequate time to IHCDCA in order for the set up in ClientTrack™ to be completed.
- While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated